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Horticultural Products Review

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EXPORT SUMMARY

U.S. exports of horticultural products to all countries in March 1991 totalled \$426.9 million, 10 percent above the same month a year earlier. All commodity groupings contributed to the improved March export showing except dehydrated vegetables, hops, and wines. Fresh grapefruit exports registered the most significant increase, more than offsetting a reduction in orange shipments. Orange shipments are down due to supply shortages following the December 1990 freeze in California. Fresh and canned vegetable exports also registered sharp increases. During the first 6 months (October-March) of fiscal year 1991, the total value of U.S. horticultural exports was \$2.6 billion - - 13 percent over the same period last year.

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All measures not otherwise noted are metric. One kilogram (kg.) = 2.2046 pounds, 1 metric ton = 2,2046.62 pounds, 1 liter = 0.2642 gallon, 1 hectoliter (hl.) = 26.42 gallons, and 1 hectare (ha.) = 2.471 acres.

U.S. EXPORTS OF SELECTED HORTICULTURAL COMMODITIES
WORLD TOTAL, OCTOBER-SEPTEMBER YEAR
MAR 91

GROUP & COMMODITY	NAME	QUANTITY				VALUE (1,000 DOLLARS)					
		CURR MO LAST YR	CURR MO CURR YR	YR TODATE LAST YR	YR TODATE CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FR, FRUIT CITRUS	MT										
GRAPEFRUIT		43,960	68,584	212,327	302,852	318,374	27,169	42,545	114,254	175,135	173,535
LEMONS		11,519	8,987	68,898	62,758	138,032	7,857	9,908	51,004	52,631	103,739
ORANGES, INCL TMPL		54,206	19,749	232,210	138,657	522,141	27,254	14,679	122,743	86,604	276,270
OTHER CITRUS		2,374	1,128	11,839	14,390	15,404	1,811	1,243	9,483	13,943	12,660
Subtotal:—		112,060	98,450	525,276	518,659	993,952	64,092	68,375	297,486	328,315	566,205
FR, FRT, NON-CIT	MT										
APPLES		27,339	26,973	237,126	245,365	365,812	14,434	17,303	116,882	149,755	191,564
AVOCADOS		275	241	3,411	1,421	6,225	442	363	3,570	1,779	8,748
CHERRIES SWT & TRT		79	198	520	1,903	22,503	84	340	698	2,444	67,258
GRAPES		1,807	1,391	79,359	94,406	192,585	1,752	1,905	76,884	99,075	196,532
KIWI FRUIT		2,163	1,240	5,361	5,430	8,287	3,421	1,897	8,409	8,267	12,890
MELONS		2,959	3,885	21,056	27,411	113,867	2,212	2,676	13,409	17,694	65,362
PAPAYA		1,236	891	6,267	5,223	13,010	1,463	1,116	6,662	6,521	13,373
PEACHES & NCTRNS		786	844	4,268	4,999	57,455	759	949	3,797	4,867	53,225
PEARS		5,410	4,927	58,761	68,240	95,373	3,144	2,966	30,855	38,726	52,848
STRAWBERRIES		2,676	2,665	8,495	8,850	37,958	4,637	5,491	18,107	22,181	64,164
OTHER NON-CITRUS		2,508	2,309	47,156	19,124	157,623	2,314	1,968	41,259	18,765	143,695
Subtotal:—		47,244	45,569	471,781	482,377	1,069,702	34,667	36,980	320,169	370,080	869,964
CND/PRP FRUIT	MT										
CHERRIES TRT CND		583	819	3,386	4,305	8,981	837	1,498	4,955	6,662	13,715
FRUIT MIXTURES		1,850	2,192	10,545	14,145	22,103	2,139	2,233	10,840	14,421	23,136
MARACHINO CHRY		245	169	1,114	1,056	2,451	397	342	1,891	1,844	4,022
PEACHES CANNED		1,515	1,315	6,573	8,153	15,678	1,641	1,423	6,652	7,923	14,640
PINEAPPLE CANNED		424	710	2,434	3,667	6,570	352	679	2,120	3,028	5,511
FRT PRP/PRS		3,340	6,425	20,995	26,467	44,170	3,882	6,549	23,237	29,412	48,331
OTHER CANNED FR		2,526	3,577	12,441	15,560	28,119	2,746	4,075	14,730	18,942	33,860
Subtotal:—		10,488	15,209	57,490	73,356	128,074	11,996	16,803	64,428	82,235	143,218
DRIED FRUIT	MT										
PRUNES, DRIED		5,518	9,510	41,725	55,222	75,365	8,737	11,839	65,976	68,272	119,344
RAISINS, DRIED		7,494	10,554	51,758	69,090	108,038	12,025	14,286	82,283	91,525	169,285
OTHER DRIED FRUIT		1,328	2,060	8,086	11,893	16,135	2,829	3,780	19,000	24,668	36,411
Subtotal:—		14,340	22,125	101,570	136,206	199,539	23,592	29,907	167,258	184,466	325,039
FROZEN FRUIT	MT										
BLUEBERRIES, FZN		441	2,359	3,152	10,612	11,094	491	1,379	2,526	6,327	8,102
STRAWBERRIES, FZN		648	812	4,130	5,837	14,530	502	1,233	4,810	6,951	18,253
OTHER FZN FRUIT		596	981	4,242	4,396	9,349	855	1,310	5,336	5,815	12,722
Subtotal:—		1,686	4,153	11,527	20,847	34,974	1,848	3,923	12,673	19,095	39,078
FRT&VEG JUICE (SSE)	KL										
GRAPEFRUIT JU CNC		3,100	2,660	14,048	14,257	34,730	2,214	1,728	11,132	8,903	25,224
ORANGE JU NT CNC		2,356	3,079	15,442	18,152	36,512	2,012	2,705	11,290	17,066	31,518
ORANGE JUICE CNC		18,781	23,131	123,783	160,738	319,460	9,514	11,102	76,967	79,099	174,208
OTHER JUICES		30,971	29,212	123,178	143,324	279,710	18,398	16,655	78,922	81,135	166,902
Subtotal:—		55,210	58,084	276,452	336,474	670,414	32,139	32,191	178,313	186,205	397,853
VEGETABLES FR	MT										
ASPARAGUS, FR, CHL		3,960	3,874	6,854	6,797	17,760	11,931	11,568	21,918	21,995	45,910
LETTUCE, FR, CH		18,356	29,174	115,454	164,061	225,017	9,442	11,275	60,838	71,467	107,827
ONIONS, FR		5,743	8,650	72,099	96,817	125,229	2,783	3,426	23,503	30,739	40,922
TOMATOES, FR, CH		9,680	11,054	46,056	69,226	121,035	10,364	11,068	46,874	49,093	86,697
OTHER VEG, FR		73,897	75,962	354,801	375,237	769,272	37,945	42,559	199,869	232,490	410,135
Subtotal:—		111,640	128,717	595,266	712,142	1,254,315	72,467	79,898	353,003	408,786	691,492
VEGETABLES CANNED	MT										
CATSUP & CHILI SA		1,909	1,082	7,851	7,271	15,020	1,297	984	6,082	5,843	11,528
SWEET CORN CANNED		9,041	10,971	65,740	64,556	130,670	6,562	8,486	52,325	52,449	100,396
TOMATO PASTE		2,167	4,635	13,533	31,739	23,837	2,418	4,800	14,777	32,573	25,321
TOMATO SAUCE		1,962	2,348	14,774	14,366	28,082	1,965	2,201	12,207	13,968	23,835
OTHER CANNED VEG.		11,940	14,759	65,763	75,183	132,953	14,674	17,319	85,043	93,549	170,462
Subtotal:—		27,021	33,799	167,663	193,116	330,563	26,917	33,792	170,435	198,384	331,544
VEGETABLES FZN	MT										
F FRY FZN		16,467	15,517	80,717	76,947	175,398	11,542	11,613	55,634	56,774	122,132
FZN SWT CORN		4,898	4,659	28,933	28,908	58,370	8,846	4,035	23,068	24,383	46,700
OTHER POT. FZN		1,180	1,494	8,360	8,609	16,772	1,114	1,342	7,706	8,128	17,120
OTHER FZN VEG		5,258	6,062	30,973	29,985	57,459	5,099	5,412	28,837	28,398	56,612
Subtotal:—		27,803	27,733	148,984	144,451	308,000	21,602	22,405	115,247	117,685	242,565
DEHYD VEGETABLES	MT										
GARLIC DEHY		503	578	3,646	3,981	7,193	1,161	1,411	9,064	8,889	17,308
ONIONS DEHY		2,404	2,357	11,413	11,637	21,484	5,236	5,695	23,807	26,996	46,248
POTATO DEHYD		2,330	2,596	14,574	15,478	23,443	3,797	2,697	19,990	17,029	33,825
OTHER DEHY VEG.		2,016	2,098	10,990	15,808	28,337	3,844	2,803	19,682	19,866	39,406
Subtotal:—		7,255	7,632	40,626	46,905	80,458	14,041	12,608	72,544	72,782	136,788
TREE NUTS	MT										
ALMND SH/PRP		14,365	16,138	79,390	103,179	162,925	47,193	46,673	258,428	290,002	513,701
ALMONDS, UNSHLD		394	728	4,760	8,683	6,892	1,022	1,807	13,078	16,186	18,102
PISTACHIO, UNSHLD		276	671	1,619	2,912	2,659	959	2,143	6,882	9,196	11,195
WALNUTS, SHLD		533	758	4,497	7,604	12,849	1,648	2,599	22,172	25,566	36,677
WALNUTS, UNSHLD		265	159	49,577	44,379	55,665	683	370	82,861	79,515	94,115
OTHER NUTS		2,324	2,596	17,517	22,821	31,943	6,285	8,732	42,767	63,603	84,785
Subtotal:—		18,161	21,052	161,361	189,581	272,936	57,793	62,327	426,192	483,071	758,579
NURSERY PRODUCTS	NONE										
CUT FLOWERS							2,010	2,270	10,288	11,477	22,439
OTHER NURS. PROD.							7,665	9,013	47,489	41,366	77,019
Subtotal:—							9,676	11,283	57,776	52,844	99,458
HOPS & PRODUCTS	MT										
HOP EXTRACT		115	253	1,533	1,377	3,069	1,817	3,094	16,735	19,986	36,613
HOP PELLETS		658	290	4,258	2,370	7,835	2,998	2,190	19,655	13,945	34,029
HOPS, NSFP		529	35	1,142	466	2,093	2,017	543	5,167	3,296	10,066
Subtotal:—		1,304	579	6,934	4,214	12,998	6,833	5,827	41,556	37,228	80,708
WINE	KL										
GRAPE WINES		7,688	7,950	37,660	46,425	85,546	10,101	10,154	50,785	61,710	112,909
OTHER WINE PRODUCT		494	889	1,828	3,855	8,857	638	412	1,842	2,378	5,816
Subtotal:—		8,182	8,839	39,487	50,281	94,404	10,740	10,566	52,628	64,088	118,726
Grand Total:							388,410	426,891	2,311,201	2,605,271	4,782,710

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES
WORLD TOTAL, OCTOBER-SEPTEMBER YEAR
MAR 91

NAME		QUANTITY				VALUE (1,000 DOLLARS)					
GROUP	COMMODITY	CURR MO LAST YR	CURR MO CURR YR	YR TODATE LAST YR	YR TODATE CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FRESH FRUIT	MT										
	APPLES	15,332	13,183	43,715	50,859	102,414	6,266	5,074	15,198	16,725	39,335
	AVOCADO	66	3	4,700	9,726	8,864	89	4	4,300	14,073	9,497
	BANANA	268,587	267,663	1,486,321	1,545,120	3,065,977	75,437	77,198	421,242	436,862	867,100
	CANTELLOUPE	34,257	46,063	119,138	134,939	229,300	12,183	13,779	35,044	40,606	73,097
	GRAPE	111,266	86,855	269,486	217,831	368,240	80,164	57,805	206,838	155,384	276,575
	KIWI FRUIT	2	15	220	3,454	30,260	2	12	376	3,628	45,100
	MANGO	2,296	5,614	4,122	7,258	58,848	1,832	5,655	3,699	7,923	58,180
	PEACH	8,404	9,380	47,936	49,061	51,257	5,414	5,857	31,130	32,373	33,453
	PEAR	13,820	12,996	30,186	23,819	41,287	5,669	5,576	15,908	13,060	23,176
	PINEAPPLE	8,833	11,327	48,576	51,301	113,295	3,402	3,518	19,726	18,193	44,880
	RASPBERRY	379	256	1,141	787	6,437	817	493	2,901	1,521	8,691
	STRAWBERRY	2,664	2,087	8,159	8,614	14,083	3,706	4,322	12,149	14,234	16,685
	OTHER MELON	16,228	20,277	57,211	67,044	92,029	4,852	7,836	15,690	24,402	27,065
	OTHER FRUIT	47,559	52,156	196,591	227,471	387,625	15,028	18,636	65,119	84,066	118,179
	Subtotal:—	529,699	527,880	2,317,510	2,397,291	4,569,921	214,867	205,772	849,327	863,057	1,641,020
DRIED FRUIT	MT										
	DATE	1,339	680	6,975	3,750	9,312	1,226	743	6,684	3,620	8,721
	DRD APRICOT	882	407	5,104	3,651	8,431	1,521	1,056	9,424	9,540	15,876
	DRD FIG & PASTE	575	881	4,720	6,417	6,150	529	832	5,740	6,404	9,303
	RAISIN	294	658	5,450	5,136	9,906	305	582	5,352	4,283	9,425
	OTHER DRD FRUIT	570	525	5,950	6,999	10,266	870	559	7,611	6,462	13,671
	Subtotal:—	3,663	3,153	28,201	25,955	44,067	4,453	3,776	34,812	30,310	54,997
FROZEN FRUIT	MT										
	FZN RASP	369	344	1,350	1,615	3,239	362	512	1,599	2,197	3,326
	FZN STR	5,818	4,893	11,262	10,282	21,533	7,154	5,402	14,868	12,881	28,306
	OTHER FZN FRUIT	1,448	1,571	9,401	8,664	17,979	1,602	1,518	11,522	9,166	21,412
	Subtotal:—	7,636	6,809	22,014	20,562	42,752	9,119	7,433	27,989	24,245	53,044
CND/PRP FRUIT	MT										
	CANNED PEACH	2,526	545	21,315	5,630	34,973	1,619	317	13,826	3,290	22,050
	CANNED PEAR	219	144	685	3,303	1,286	132	104	3,381	224	8,805
	CANNED PINEAP	21,751	20,204	130,142	133,233	278,727	12,737	12,871	73,710	85,062	164,891
	MIXED FRUIT	655	162	3,476	1,275	6,210	658	175	3,197	1,248	6,028
	PRP/PRES FRUIT	15,552	14,090	86,266	84,731	181,267	22,447	22,618	124,574	135,617	270,559
	OTHER CND FRUIT	10,679	8,025	64,201	62,192	120,535	15,862	12,865	97,808	97,028	186,570
	Subtotal:—	51,385	43,172	306,088	287,365	623,000	53,457	48,952	313,498	322,472	650,904
FRT&VEG JUICE (SSE)	KL										
	APPLEPEAR JU	56,935	65,257	336,378	482,150	813,804	12,109	16,928	71,067	105,999	156,539
	FCOJ	131,762	103,918	1,028,196	611,138	1,811,601	52,895	21,364	310,795	157,371	625,158
	GRAPE JU	6,100	5,593	37,925	54,084	98,571	1,369	1,255	9,037	12,531	23,054
	PINAP JU	22,170	23,287	149,400	193,446	318,981	3,798	6,543	29,233	47,447	68,144
	OTHER FRUIT JU	19,181	9,197	211,898	62,752	337,240	6,105	3,226	65,951	22,001	111,870
	Subtotal:—	236,150	207,255	1,763,800	1,403,573	3,380,199	76,278	49,318	486,085	345,352	984,768
VEGETABLES FR	MT										
	ASPARAGUS	6,117	6,023	14,808	19,365	18,840	8,988	8,318	22,968	27,541	27,037
	BEAN	2,504	1,175	11,193	9,568	12,524	2,083	1,554	15,325	8,574	16,290
	BELL PEPPER	15,667	14,844	82,715	73,071	101,009	20,767	11,208	98,667	58,187	124,732
	CARROT	3,786	4,081	41,413	36,563	59,633	1,017	1,433	8,174	11,000	11,704
	CHILI PEPPER	3,183	2,285	15,202	15,422	34,478	3,530	2,007	18,247	12,098	31,333
	CUCUMBER	27,158	22,977	161,761	144,024	189,141	10,490	11,807	64,098	61,081	75,720
	EGGPLANT	2,911	3,689	11,951	15,800	14,523	2,813	2,732	15,458	9,835	17,026
	GARLIC	1,703	2,297	7,683	5,884	19,848	2,338	2,864	8,900	7,236	19,105
	LETTUCE	1,272	701	10,772	8,497	14,297	592	320	4,186	4,075	5,336
	ONION	40,576	55,647	101,798	114,680	174,167	9,709	13,791	41,428	59,025	69,185
	POTATO, INCL SD	53,024	62,360	194,257	205,734	305,026	13,790	11,054	43,621	35,247	70,357
	SQUASH	10,065	9,687	64,433	59,251	78,593	4,981	7,876	36,831	37,949	43,022
	TOMATO	76,251	67,815	296,525	225,051	387,261	98,766	55,964	350,598	134,904	391,250
	OTHER FRV VEG	37,384	26,778	181,026	138,220	284,779	19,159	14,861	98,075	80,304	152,548
	Subtotal:—	281,606	280,366	1,195,543	1,071,138	1,694,126	199,029	145,896	826,582	547,061	1,054,652
VEG CANNED/DEHYD	MT										
	CND ARTICHOKE	963	226	6,965	8,872	13,002	1,836	383	13,587	15,822	24,177
	CND MSHROOMS	5,189	4,301	21,128	23,071	45,392	14,630	9,960	53,884	56,646	115,374
	CND PIMIENTO	737	365	5,410	4,844	9,938	869	615	6,521	8,009	12,580
	CND TOM	1,672	671	19,628	5,826	25,831	1,008	260	10,262	2,482	13,828
	TOM PASTE	7,198	3,476	26,095	9,524	70,619	6,291	2,402	22,494	6,241	59,999
	TOM SAUCE	979	607	5,273	7,039	13,609	548	280	3,215	4,812	7,497
	DEHYD VEGETABLES	10,751	10,146	49,252	42,280	105,210	13,338	10,378	63,958	57,878	132,298
	OTHER CND VEG	17,971	12,768	97,925	87,026	179,952	16,890	12,354	88,395	82,926	164,798
	Subtotal:—	45,464	32,563	231,680	188,485	463,556	55,415	36,636	262,321	234,821	530,554
VEGETABLES FZN	MT										
	BROCCOLI FZN	11,494	15,161	56,785	56,291	113,856	8,074	9,783	38,241	37,425	75,692
	CAULIFLOR FZN	469	364	21,598	22,133	27,857	358	257	15,091	16,790	19,700
	OKRA FZN	230	334	1,485	2,169	4,077	107	158	746	1,062	2,150
	POTATO FZN	4,831	5,138	24,994	34,433	58,042	2,788	2,773	13,763	18,839	32,575
	OTHER VEG FZN	8,278	67,997	50,857	551,989	341,228	7,732	6,542	45,626	39,793	80,506
	Subtotal:—	25,305	88,995	155,722	667,017	545,061	19,060	19,515	113,469	113,910	210,625
TREE NUTS	MT										
	BRAZILS TOT	225	308	3,012	3,649	11,924	620	600	7,700	7,900	19,615
	CASHEWS TOT	3,784	2,916	25,166	28,867	52,487	14,794	13,193	100,566	131,026	210,321
	FILBERTS TOT	265	626	1,978	3,231	3,523	729	1,506	4,859	9,510	9,155
	PISTACHIOS TOT	96	149	1,482	543	2,062	404	464	5,898	1,622	7,637
	OTHER NUTS	5,948	5,399	45,565	52,323	79,069	6,142	7,800	59,403	91,334	107,149
	Subtotal:—	10,321	9,400	77,204	88,615	149,068	22,690	23,566	178,428	241,393	353,879
NURSERY PRODUCTS	NONE										
	CARNATIONS						6,241	6,836	37,285	37,781	68,201
	ROSES						5,596	4,927	43,636	52,051	83,926
	OTHER CUT FLRS						14,679	15,357	79,711	80,743	157,270
	OTH NURS PROD						7,614	11,566	74,424	86,159	135,975
	Subtotal:—						34,130	38,687	235,058	256,736	445,374
HOPS & PRODUCTS	MT										
	HOPS & PELLETS	1,484	1,260	6,059	6,477	6,700	6,374	4,907	26,060	22,207	28,373
	OTHER HOP PRODS	90	471	1,118	1,149	1,119	504	3,399	6,885	8,500	6,886
	Subtotal:—	1,575	1,732	7,178	7,626	7,819	6,878	8,307	32,945	30,708	35,260
WINE	KL										
	GRAPE WINES	18,879	16,557	146,310	124,370	263,508	63,171	65,254	498,459	502,512	912,741
	OTHER WN PROD	754	595	4,284	3,984	8,187	1,555	1,258	7,997	8,061	15,132
	Subtotal:—	19,633	17,152	150,594	128,354	271,695	64,727	66,512	506,457	510,574	927,873
Grand Total:						760,107	654,375	3,866,977	3,520,644	6,942,955	

UPDATES

General Developments

--Sweden will lower its border protection on agricultural products. On April 26, 1991, the Ministry of Agriculture and Forestry proposed an average 10-percent decrease in Sweden's import levies on agricultural commodities. When implemented as anticipated on July 1, 1991, domestic prices of agricultural commodities to producers are expected to drop. Import levies have been frozen at their current levels for a year permitting an estimated overprotection of 17 percent. The Ministry believes that lowering levies will prevent the Swedish trade from taking advantage of the overprotection while providing farmers some margin of profitability with the remaining 7 percent. It is proposed that a reference price system for commodities subject to import levies be implemented. These reference prices would be adjusted to the decreased prices after July 1, 1991.

Citrus and Products

--Mexican orange juice production forecast for 1990/91 is reduced from 48,000 to 30,000 metric tons as fewer oranges are being processed. Because of low international prices for orange juice, many growers sold oranges to the domestic fresh market where prices were more favorable. Orange juice exports consequently are forecast to decrease sharply. The orange production forecast for 1990/91 (Oct.-Nov.) is maintained at 2.4 million tons.

MEXICO: SUPPLY AND DISTRIBUTION OF ORANGE JUICE (1,000 METRIC TONS, 65 DEGREES BRIX)

Year	Beginning Stocks	Production	Imports	Exports	Domestic Consumption	Ending Stocks
1988/89	0	33,712	240	32,740	1,212	0
1989/90	0	47,500	250	46,000	1,750	0
1990/91 F	0	30,000	0	28,250	1,750	0

--The 1990/91 (July-June) Brazilian frozen concentrate orange juice (FCOJ) production estimate has been increased based on record Sao Paulo industrial yields of 4.15 kilograms of orange juice per (40.8 kilogram) box of oranges. Ending stocks have correspondingly been increased. The orange juice export forecast for marketing year (MY) 1990/91 is maintained at 825,000 metric tons. According to unofficial trade data from July 1990 to March 1991, Brazil has exported 617,000 tons of FCOJ (excluding shipments from the Northeast estimated at about 25,000 tons).

Sao Paulo's commercial orange crop forecast for 1991/92 is maintained at 240 million boxes. The oranges for processing forecast for Brazil for 1991/92 was reduced from 8.45 million to 8.245 million tons. Fresh consumption and fresh exports of oranges are expected to realize a larger part of total production in 1991/92. Producer financial difficulties and relatively higher

prices in the fresh fruit market will induce increased deliveries of fruit to the fresh market or for fresh export in 1991/92. Brazilian orange producers are in a difficult financial situation because of current low orange prices. For some growers (whose yields are below average), current prices are equal to or below the cost of production. Some growers are in financial trouble because they received advances from the processors for the 1990/91 crop which will exceed the final on-tree price. These growers need to repay the processors in money or in the form of fruit from the next crop. As a result some growers are reducing grove care or shifting to other crops such as sugar cane.

The FCOJ production forecast for Brazil in 1991/92 was reduced to 795,000 tons based on the lower processing forecast and expected lower industrial yields due to abundant rains since December. Reduced exports are forecast in 1991/92 due to lower output. Stock levels are expected to be drawn down.

SAO PAULO: SUPPLY AND DISTRIBUTION OF ORANGES 1/

ITEM	1989	1990	1991
-----Million Boxes 2/-----			
Production 3/	295	240	240
Fresh Consumption	38	36	40
Fresh Export	2	4	5
Processed	255	200	195

BRAZIL: SUPPLY AND DISTRIBUTION OF FCOJ 1/ 5/

ITEM	1989	1990	1991
FCOJ Brazil --1,000 Metric Tons, 65 Degrees Brix 4/--			
Beginning Stocks	24	95	105
Production			
Sao Paulo	1,025	830	770
Other States	25	25	25
Total	1,050	855	795
Total FCOJ Supply	1,074	950	900
Domestic Consumption	20	20	20
Export Shipments 3/			
Sao Paulo	934	800	785
Other States	25	25	25
Total	959	825	810
Ending Stocks	95	105	70
Total FCOJ Distribution	1,074	950	900

1/ Harvesting and processing usually begin in late April or early May. The marketing season for FCOJ begins on July 1 of year indicated.

2/ 40.8 kg. or 90 pounds.

3/ Includes oranges produced in Sao Paulo's commercial citrus zone, plus tangerines used for processing.

4/ One metric ton at 65 degrees brix equals 344.8 gallons at 42 degrees brix.

5/ Includes tangerine juice.

Fresh Non-Citrus

- A Canadian report recommends formation of national marketing agency for apples. On May 8, Canada's National Farm Products Marketing Council released a report recommending the establishment of a national marketing agency for fresh apples. It is now up to the Minister of Agriculture to determine whether to proceed with establishing the agency. His decision will be made only after a formal vote of apple growers and after a legal obstacle is overcome which currently restricts national supply management powers to the poultry and tobacco industries. The United States has formally expressed its opposition to the formation of such an agency. It is probable that import controls would be imposed to ensure the operation of the supply management mechanism.
- The Twelfth Session of the FAO Intergovernmental Group on Bananas will be held in Madeira, Portugal, June 3-7, 1991. The group will review and discuss the current market situation and short- and medium-term outlook for bananas; consideration of a revised draft program of research and development for common fund financing; and policy developments and prospects for coordinated international action on bananas. Under the latter agenda item, the group will discuss ways to maintain market equilibrium, and market access issues, including developments within the framework of the GATT and implications for the banana market of the European Community's goal of creating a single market by the end of 1992.

Other Processed Fruit

- Venezuela may import tomato paste for the first time in several years because of a short 1991 tomato crop. An abnormal period of early rains and an unusually severe white fly infestation at harvest time (mid-March) damaged the tomato, sesame, tobacco and cantaloupe crops.

Tomato paste manufacturers, who purchase 85 percent of Venezuela's tomato crop, estimate 1991 losses at 25,000 tons, or 20 percent of the annual crop used for paste. Besides the drop in raw product availability, the July 1990 change in Venezuela's tariff schedule, which eliminated a ban on imports of tomato paste and dropped the ad-valorem duty from 40 to 20 percent, prompted the industry to consider importing tomato paste.

The Government of Venezuela believes that the white fly infestation is a result of ecological disequilibrium stemming from the overuse of pesticides by farmers. In April, the Government announced a national campaign aimed at protecting tomato farmers from the white fly, including the enforced use of new cropping techniques. (Based on a report from the U.S. Agricultural Counselor, Caracas)

Dried Fruit and Nuts

--Argentine prune production and exports are expected to increase in 1991. Although production is up 12½ percent from 1990, it is still considered below normal. Plums and prunes are principally grown in Mendoza and Buenos Aires provinces, accounting for nearly 80 percent of production. The varieties used for dried prunes are D'Angen and Presidential. Quality is considered good, and the size of the prunes was very good.

Exports are expected to increase by 17 percent to 7,000 tons. For the first six months of 1990, (the most recent data available), Brazil was the largest customer, with 1,931 tons, followed by Italy (561 tons), France (135 tons), and Spain (100 tons).

--French prune production is expected to decline and imports to increase because of a freeze in growing areas. On April 20-21, 1991, there were freezing temperatures in the southwest growing areas, and cold and rainy weather since then. The U.S. Agricultural Counselor in Paris reports that estimates of production by the French Prune Board are preliminarily set at 22,000 to 26,000 tons. The 1990/91 crop was 33,000 tons. This expected decrease in production, along with a strong competitive U.S. product, is expected to prompt dramatically increased imports in the coming year.

For updated production, supply, and distribution information on dried prunes, see the table on page 35.

Vegetables

--Mexican fresh tomato exports are expected to be down 40,000 tons this year from marketing year 1989/90 (October/September) totaling about 320,000 tons. While total tomato production is expected to be about 1.8 million tons, up from 1.6 million tons the previous season, export prospects have fallen due to low U.S. prices in comparison to domestic prices in Mexico. With relatively low inflation and rising consumer incomes, the domestic market for tomatoes in Mexico is expanding. This indicates that the domestic market can both absorb larger quantities of product as well as outbid the export market for supplies. (Based on a report from the U.S. Agricultural Counselor in Mexico City.)

WORLD RAISIN SITUATION

Raisin and sultana production in 1990/91 is down in the eight principal producing countries, which contribute an estimated 85 percent of world supplies. Production for 1990/91 is estimated to be off 8 percent over that of 1989/90, due to lower crops in the United States, Greece, Chile and South Africa. Larger crops are expected in Australia, Argentina, Mexico, and Turkey. Consumption in the eight countries, however, is expected to increase about 8 percent.

Stock levels at year's end will increase just slightly, to about 34 percent of average production. The 1990/91 year includes Southern Hemisphere crops harvested early in calendar 1991 along with the Northern Hemisphere crops harvested late in 1990.

Northern Hemisphere Situation and Outlook

United States

In the United States, raisin production in 1990 is off 11 percent from the previous year. This is mainly because of the size of the tremendously large 1989/90 crop, rather than any production shortfall. Consumption is little changed from last year, and exports are expected to increase. This should cause a drawdown on stocks to about 44 percent of production.

Greece

Since the last update on the sultana situation in Greece, the Greek Ministry of Agriculture has revised downward even further the production estimate for the 1990 crop, to 40,000 tons. This is less than half the size of the 1989 crop. Most of the decrease was due to the serious drought that affected Greece. In addition, because of changes in the EC price support program for sultanas, many farmers preferred to dry fewer sultanas and market the crops to the fresh market and wineries.

Current soil moisture is much improved over last year, because of winter rains. Also, higher income supports indicate that production will recover in the coming year.

Exports for the 1989/90 marketing year were 55,000 tons. Exports for 1990/91 are forecast at 40,000 tons. Although the 1990 harvest was very small, it was of good quality.

EC policy changes implemented last year and continuing this year will cause nominal farm prices to decline by 19 ECU/100 kg. (about 12¢ per pound). However, income support will nearly double in drachma terms, from 110,000 drachmas/hectare to 200,000 drachmas/hectare. In dollar terms, this is about \$700 per hectare for 1990, and \$1,069 per hectare in 1991. Assuming average yields of about 2.2 tons per hectare, income support is equivalent to about 16¢ per pound in 1990, and 25¢ per pound for 1991.

Mexico

Mexican production reached an estimated 10,500 tons in 1990, up from last year's 7,000 tons. Imports have also increased dramatically following the government's liberalization of import permits. Imports are expected to total about 2,500 tons in the current marketing year. In the 1989/90 marketing year, U.S. exports of raisins were 1,176 tons.

Turkey

Production in Turkey is expected to be 150,000 tons in 1990, just slightly higher than last year's output.

For more details of the supply and distribution situation in the Northern Hemisphere countries, see the December 1990 Horticultural Products Review.

Southern Hemisphere Situation and Outlook

Argentina

Production in 1991 is expected to be 8,000 tons, up nearly 7 percent from the previous year. While adverse weather affected most of Argentina in 1990, the provinces where most raisins are grown, Mendoza and San Juan, were two of the least affected. Quality is considered to be good.

Export prices were \$894 per ton for the first half of 1990, calculated from total export sales of \$2.8 million on 3,129 tons. Most exports in this January to June period went to Brazil (1,897 tons), followed by Spain (402 tons) and Germany (194 tons). Exports for all of 1990 are estimated at 5,000 tons, and are forecast to increase 6 percent in 1991.

On March 31, 1990, the government reduced the export tax on dried fruit. Since July 1990, it has been zero.

South Africa

South Africa's 1990/91 crop is expected to be 29,000 tons, off 15 percent from last year. Untimely rain during the drying process in January 1991 restricted sunlight, increased humidity, and caused substantial damage. Although not as low as the flood-damaged 1988/89 crop, 1990/91 output is still below the 5-year average.

SOUTH AFRICAN DRIED VINE FRUIT PRODUCTION BY TYPE
(QUANTITY IN METRIC TONS)

TYPE	5 YEAR AVERAGE	1987/88	1988/89	1989/90	1990/91
SULTANA					
UNBLEACHED	8,408	6,987	4,410	8,314	6,500
BLEACHED	3,247	3,434	2,701	4,201	3,000
THOMPSON SEEDLESS	18,506	16,565	12,961	21,105	19,000
SUBTOTAL SULTANA	30,161	26,986	20,072	33,620	28,500
OTHER RAISINS (HANEPOOT)	658	462	567	484	500
TOTAL	30,819	27,448	20,639	34,104	29,000

Most of the crop is exported, with a little over one quarter of the crop consumed domestically. Exports for the current 1990/91 year are expected to reach about 20,350 tons, similar to last year's 20,567 tons.

Prices for export are very good, mainly because of the relative value of the rand, and the price floor set by the European Community's Minimum Import Price program for sultanais (raisins). Gross export returns were R2.66/kilograms in 1988, R3.08/kg. in 1989, and R3.63/kg. in 1990. This is an increase in rand terms of about 16-18 percent per year since 1988. This is markedly faster than the inflation rate, which is about 14 percent.

Imports are technically duty-free. However, raisins may only be imported with an import permit. In practice, the permit is granted by the Department of Agriculture based on the recommendation of the Dried Fruit Board, a government-mandated grower organization. There is currently an import surcharge to manage the balance of payments, but this may be lifted soon. The current system of quantitative controls will most likely be replaced with a tariff system, as the Government aims to comply with the General Agreement on Tariffs and Trade (GATT) requirements. Imports have been zero for several years.

Chile

Production in the 1989/90 marketing year jumped again, to 30,500 tons, from 24,500 in 1988/89. Production in 1990/91 is expected to drop 11 percent to 27,000 tons. Production is down somewhat because of the drought affecting table grape production. Quality is improving, as improved machinery and technology is being used to process the raisins. Eighty-five percent of production is derived from Thompson Seedless, about 10 percent from Flame Seedless, and the rest from Red and Black Seedless grapes.

Over 90 percent of production is sun dried. About 6 - 7 percent are dried in heated drying tunnels, which produce golden raisins from Thompson Seedless. Nearly all of Chilean production is for export. The Latin American market, which accounted for 80 percent of exports in the early 1980s, is down to 40 percent. While exports to other South American destinations are still higher than in the mid-1980s, exports to North America, Europe, and Asia have increased at a faster rate.

CHILEAN RAISIN EXPORTS, 1989 & 1990 (QUANTITY IN METRIC TONS)

Country	1989	1990	Change
United States	3,515	5,072	44%
Brazil	5,704	3,889	-32%
Colombia	2,688	3,088	15%
Peru	1,592	2,378	49%
Germany	1,360	1,931	42%
Hong Kong	761	1,496	97%
Netherlands	707	1,444	104%
Others	4,452	7,101	60%
Total	20,779	26,399	27%

Australia

Australian production during 1990/91 (1991 crop) had excellent weather conditions. Production is expected to be around 80,000 tons, about a 35-percent increase from last year. Yields are up as well, to 21.5 tons per hectare, from last year's 19.82 tons/hectare. Crop quality is also expected to be very good.

Imports rose 3 percent to 5,055 tons in calendar year 1990. This year, however, imports are expected to drop because of smaller Northern Hemisphere crops. Turkey is the major supplier of imported raisins into Australia, and they compete at the low end of the market.

Exports fell substantially in 1989 and 1990 from normal levels because of the small crops. This coming year, however, exports are expected to increase substantially, based on a larger Australian crop, and smaller crops in the Northern Hemisphere.

New legislation introduced into Parliament will further restructure the Australian dried vine fruit industry. One bill would incorporate the Australian Dried Vine Fruits Corporation into the Australian Horticultural Corporation (AHC). A new body, known as the Australian Dried Fruits Board, will be a largely independent body under AHC oversight.

In other developments, while the statutory equalization scheme will no longer exist after the 1992 season, an industry agreement is in place. However, rather than being mandated by the government as in the past, this will simply be a legal agreement between the parties.

Tariffs, which have fallen from 23 percent in 1988 (18 percent for LDC's) to 18 percent in 1992 (10 percent for LDC's) will be further reduced in the future. The Australian Government's 1991 March Economic Statement proposes further reductions in the raisin tariff to 5 percent by 1996.

AUSTRALIA: SULTANA AND LEXIA RAISIN TRADE (QUANTITY IN METRIC TONS)

Export Destinations	1989	1990	Import Origins	1989	1990
Germany	12,233	11,458	Turkey	3,737	3,566
Canada	2,065	10,468	Iran	NA	188
United Kingdom	1,826	6,827	Greece	40	124
New Zealand	1,091	2,126	United States	2	106
France	686	388	Mexico	68	83
Japan	589	1,631	Chile	57	18
Belgium/Luxembourg	316	216			
Norway	269	256	Others	65	18
Others	5,775	3,869	Total	3,969	4,103
Total	25,372	37,929			

Note: Time periods are March to December only.

Importing Countries

JAPANESE IMPORTS OF RAISINS, 1987 - 1990 (QUANTITY IN METRIC TONS)

COUNTRY OF ORIGIN	1987	1988	1989	1990
UNITED STATES	20,289	24,987	25,067	23,620
AUSTRALIA	1,973	2,173	2,111	1,605
SOUTH AFRICA	2,666	2,562	1,638	1,768
OTHER	143	244	287	220
TOTAL	25,071	29,966	29,103	27,213

Source: Japan Tariff Association

Korea

Korea imported over 6,259 tons of raisins in 1990. The United States was the leading supplier, with 4,472 tons, followed by Chile, with 560 tons.

UNITED KINGDOM IMPORTS OF RAISINS/SULTANAS (QUANTITY IN METRIC TONS)

Source	1988	1989	1990
Turkey	21,730	25,910	24,368
United States	21,119	21,268	23,506
Greece	18,537	20,183	22,026
Australia	8,477	7,061	6,211
Afghanistan	6,003	3,090	9,684
South Africa	3,605	2,771	3,285
Iran	1,295	319	2,875
Others	1,910	2,149	2,627
Total	82,676	82,751	94,582

Source: Her Majesty's Customs and Excise.

RAISINS: PRODUCTION, SUPPLY, AND DISTRIBUTION
SELECTED COUNTRIES 1988/89 - 1990/91¹
(METRIC TONS, PACKED WEIGHT)

COUNTRY	BEGINNING STOCKS	PRODUCTION	IMPORTS	TOTAL SUPPLY	EXPORTS	DOMESTIC CONSUMPTION	ENDING STOCKS	TOTAL DISTRIBUTION
Country	Beginning Stocks	Production	Imports	TOTAL SUPPLY	Exports	Domestic Consumption	Ending Stocks	TOTAL DISTRIBUTION
Greece								
1988/89	2,500	77,800	0	80,300	50,000	5,000	25,300	80,300
1989/90	25,300	83,580	0	108,880	65,000	6,500	37,380	108,880
1990/91	37,380	40,000	0	77,380	35,000	7,500	34,880	77,380
Mexico								
1988/89	0	11,000	500	11,500	6,000	4,000	1,500	11,500
1989/90	1,500	7,000	1,500	10,000	6,000	8,000	0	10,000
1990/91	0	10,500	2,500	13,000	5,000	0	0	13,000
Turkey								
1988/89	0	150,000	0	150,000	130,000	15,000	5,000	150,000
1989/90	15,000	140,000	0	145,000	115,000	15,000	15,000	145,000
1990/91	0	150,000	0	150,000	110,000	20,000	35,000	165,000
United States								
1988/89	137,001	315,060	10,940	463,001	97,750	243,476	122,575	463,001
1989/90	122,575	366,665	9,796	499,036	105,743	215,302	167,991	499,036
1990/91	167,991	327,000	9,000	503,991	110,000	210,000	153,991	503,991
TOTAL NORTHERN HEMISPHERE								
1988/89	139,501	554,660	11,440	705,601	283,750	267,476	154,375	705,601
1989/90	154,375	527,245	11,386	762,916	291,743	250,802	228,371	762,916
1990/91	220,371	527,500	11,500	759,371	260,000	275,500	223,371	759,371
Argentina								
1988/89	867	7,000	0	7,867	4,453	3,000	414	7,867
1989/90	414	7,500	0	7,914	5,000	2,700	214	7,914
1990/91	214	8,000	0	8,214	5,300	2,600	314	8,214
Australia 4/								
1988/89	6,600	60,012	5,055	71,667	42,256	24,878	4,333	71,667
1989/90	4,533	58,463	4,924	68,920	43,000	25,000	6,920	68,920
1990/91	4,920	80,000	5,000	85,920	51,830	27,453	6,537	85,920
Chile								
1988/89	346	24,500	0	24,846	20,779	3,900	167	24,846
1989/90	167	30,500	0	30,667	26,399	4,018	250	30,667
1990/91	250	27,000	0	27,250	23,000	4,050	200	27,250
South Africa								
1988/89	12,007	20,639	0	33,446	17,903	9,134	6,009	33,446
1989/90	6,409	34,104	0	40,513	20,567	7,429	12,517	40,513
1990/91	12,517	29,000	0	41,517	20,350	8,100	13,067	41,517
TOTAL SOUTHERN HEMISPHERE								
1988/89	20,620	112,151	5,055	137,826	85,391	40,912	11,523	137,826
1989/90	11,523	137,567	4,924	148,014	94,366	39,147	13,501	148,014
1990/91	13,901	144,000	5,000	162,901	100,480	42,203	20,218	162,901
WORLD TOTAL								
1988/89	160,121	666,111	16,435	843,427	369,141	308,388	165,498	843,427
1989/90	165,838	728,112	16,220	910,930	386,709	289,945	234,173	910,930
1990/91	234,272	671,500	16,500	922,272	380,480	317,703	244,089	922,272

¹ 1990/91 figures are forecast. Northern hemisphere marketing years begin in August. Marketing years for Southern Hemisphere raisins (which are harvested early in the second of the split years shown) begin Jan. 1, except December 1 in South Africa and March 1 in Australia. Domestic consumption figures include raisins used for feed and distillation purposes. Includes currants. U.S. production data have been converted to packed weight basis in order to align them with the other supply and distribution statistics. Production estimates on a sweatbox weight basis for 1988/89, 1989/90, and 1990/91 respectively, are 332,487, 403,611, and 350,644 metric tons. These figures are slightly revised from May 1990. U.S. import data are from U.S. Department of Commerce, Bureau of Census. Export data are from the Raisin Administrative Committee. 4/ Includes sultanas and lexia raisins (mostly muscats). (Mark Thompson - 202 447 6877)

June 1991
Horticultural and Tropical Products Division, FAS/USDA
Production Estimates and Crop Assessment Division, FAS/USDA

THE CHILEAN FRESH FRUIT INDUSTRY

Chile is Latin America's leading fruit exporter for a number of reasons. Consistently sound macroeconomic policies have helped ignite dynamic economic growth. As the most open economy in Latin America, Chile is unrestricted by foreign currency controls, and import and export restrictions are minimal. The Chilean government is committed to minimizing inflation. Foreign investment rules are transparent.

Chile's long shape and two longitudinal mountain ranges have facilitated varied micro-climates which help ensure constant fruit supplies. Costs of production are relatively low. Domestic agricultural policies, including registration of land titles and more equitable land taxes, have encouraged growers to utilize their land more productively. Major governmental expenditures for irrigation projects have been directed to the central valley production region, the key fruit growing area. Increased use of inputs such as fertilizer and pesticides have also helped spur production. Although there is no developed extension service, academic, governmental and private programs have provided technical assistance to major crops. Chile's attention to assuring quality fruit has also boded well for gaining market and product acceptance in the international market.

Chile has carved a niche as a supplier of fresh fruit during the Northern Hemisphere's winter months when there are few competitors. Its marketing efforts are aided by the fact that it grows fruit varieties already familiar to Northern Hemisphere countries. About 40 percent of Chilean fruit is exported to the United States, its largest market. The European Community (EC) is the second largest market, while Pacific Rim countries show promising signs of becoming strong buyers. Apples, pears, and table grapes alone account for roughly 90 percent of total export volume.

Table Grapes: The United States is the largest export market for table grapes, absorbing 67 percent of total exports while the EC takes 25 percent of total grape exports. Since 1980, production has skyrocketed 747 percent to an estimated 720,000 tons in 1991 while exports are estimated to have climbed 980 percent to 540,000 tons during the same period. Chile grows an estimated 36 grape varieties. The three most dominant are Thompson Seedless, Flame Seedless and Ribier, contributing 46, 18, and 12 percent of total exports, respectively.

Apples: Apples are Chile's second largest fruit export by volume and value after table grapes. The EC takes the bulk of Chilean apple exports followed by the Middle East. Production is estimated to have expanded 201 percent from 1980 to 1991; exports rose 105 percent during the same period. Chile produces mainly red apples of the Red Delicious variety. Most are exported to the EC and Middle East markets. The United States mainly buys Granny Smiths from Chile.

Apricots: Of total exports, 50 percent are marketed in the United States, with Katy (37 percent) and Modesto (25 percent) the most common varieties for export.

Cherries: All cherries are shipped by air. Eighty-five percent of total cherry exports are of the Bing variety. The United States purchases 50 percent of total exports.

Peaches and Nectarines: Seventy-five percent of Chile's total peach and nectarine exports are purchased by the United States. New varieties will permit more to be exported to Europe and the Middle East. The O'Henry peach variety makes up 24 percent of exports. The most popular nectarine variety is Fantasia which accounts for 16 percent of exports. During the last exporting season, the Middle East accounted for over 46 percent of total exported, the largest market for nectarines. For peaches, Latin America showed the most growth.

Pears: Chile exports 60 percent of its pears to the EC and 26 percent to the United States. It cultivates 36 different varieties of pears, but the most important export variety is Pacham's Triumph which accounts for 68 percent of total exports.

Plums and Prunes: About 60 percent of plums and prunes are marketed in the United States. Of the 36 different varieties grown, the Friar variety is the most important type exported, accounting for over 25 percent of exports.

The fruit industry plays a major role in the Chilean economy. In 1990, agriculture comprised 8 percent of Gross Domestic Product (GDP). Fruit accounted for 46 percent of agricultural sales receipts. Table grape revenue made up two-thirds of all fruit earnings or 2½ percent of the GDP that year. Phenomenal growth has spawned infrastructure development and more support industries and services. Greater employment opportunities have resulted.

Chile has about 100 fruit exporters, with seven controlling 50 percent of the trade. Three of these are transnational firms that supply their parent country market. Out of 8,000 total fruit growers, 1,600 may be considered significant. Many of the foreign export firms are also involved in growing fruit. Saudi Arabia's fruit imports come from their Chilean fields and much of the U.S. trade is controlled by North American interests.

While Chileans own most of the fruit-growing area, foreign-owned trading companies manage 40 percent of total exports. The influence of large trading companies extends to the farm level through production/purchase/quality control contracts with growers wishing to market under their label. These companies also provide growers credit by borrowing from banks and relending to contract farmers. They utilize their world marketing networks to find outlets for Chilean fruits.

Out of a total labor force of 4.7 million, 250,000 workers depend directly on the fruit industry. Roughly 50 percent of these are temporary laborers who work six to 10 months out of the year. They are mostly women, non-unionized, and mobile. Skilled workers make about U.S.\$7.20 per day, while unskilled labor earn over U.S.\$2.00 per day. Peripheral industries dependent on the fruit industry which provide services such as packing, transportation and administration employ another 250,000 workers.

In general, Chile's deciduous fruit is trucked from the fruit region to nearby ports. During the peak of Chile's fruit season, over one-third of the country's total truck fleet of 10,000 refrigerated trucks undertake this operation. Most fresh fruit leaves Chile from three ports: Valparaíso (78 percent), San Antonio (9 percent) and Coquimbo (9 percent). Over 70 percent of Chilean exports to the United States are destined for the Port of Philadelphia, 20-25 percent to Los Angeles and the rest to Houston, Tampa and New Orleans. High-value items such as early season table grapes and apricots are shipped by air.

Costs of production are low, but profit margins have narrowed over the last few years. Fruit producers turn over their fruit to exporters who determine the market price for each box of fruit sold, then subtract for transportation, handling, marketing and profit costs from the sale price. The farmer receives the remaining of the market sale price to use against production costs. Thus, the grower assumes most of the risk, given that 80 percent of fruit exported to the U.S. market is exported on consignment. Labor costs remain low and may comprise as much as 18 percent of total production costs. Australia and New Zealand, both Southern Hemisphere fruit producers, pay wages at three to four times the Chilean level.

The fruit industry is highly leveraged. The producer finances development of new fields and purchases fertilizers and other equipment obtained on credit using 10-month credit lines. Interest rates are generally higher than in more developed countries to counterbalance sudden jumps in inflation. Grower expansion and high debt have cut into profit margins and have left many growers in a risky financial position. Those considered uncreditworthy borrow from exporters who, in turn, borrow from the banks and relend at higher rates. There is no long-term agricultural credit market.

There is speculation concerning the future prospects of the Chilean fruit industry, given growth in fruit production. Continued increases in production and exports are expected as roughly 30 percent of planted area has not reached mature, high yield production. However, the recent outlook has been tempered by low returns on fruit exports which have caused some farmers to restrict planted area expansion. Evidence of this is found in the slowing expansion of deciduous fruit planted area. The industry naturally predicts an optimistic future for many more years to come. Yet, eventually grower profits will be squeezed. Inevitably, given the already precarious financial position, there will likely be a fallout among growers unable to adapt to competitive market conditions.

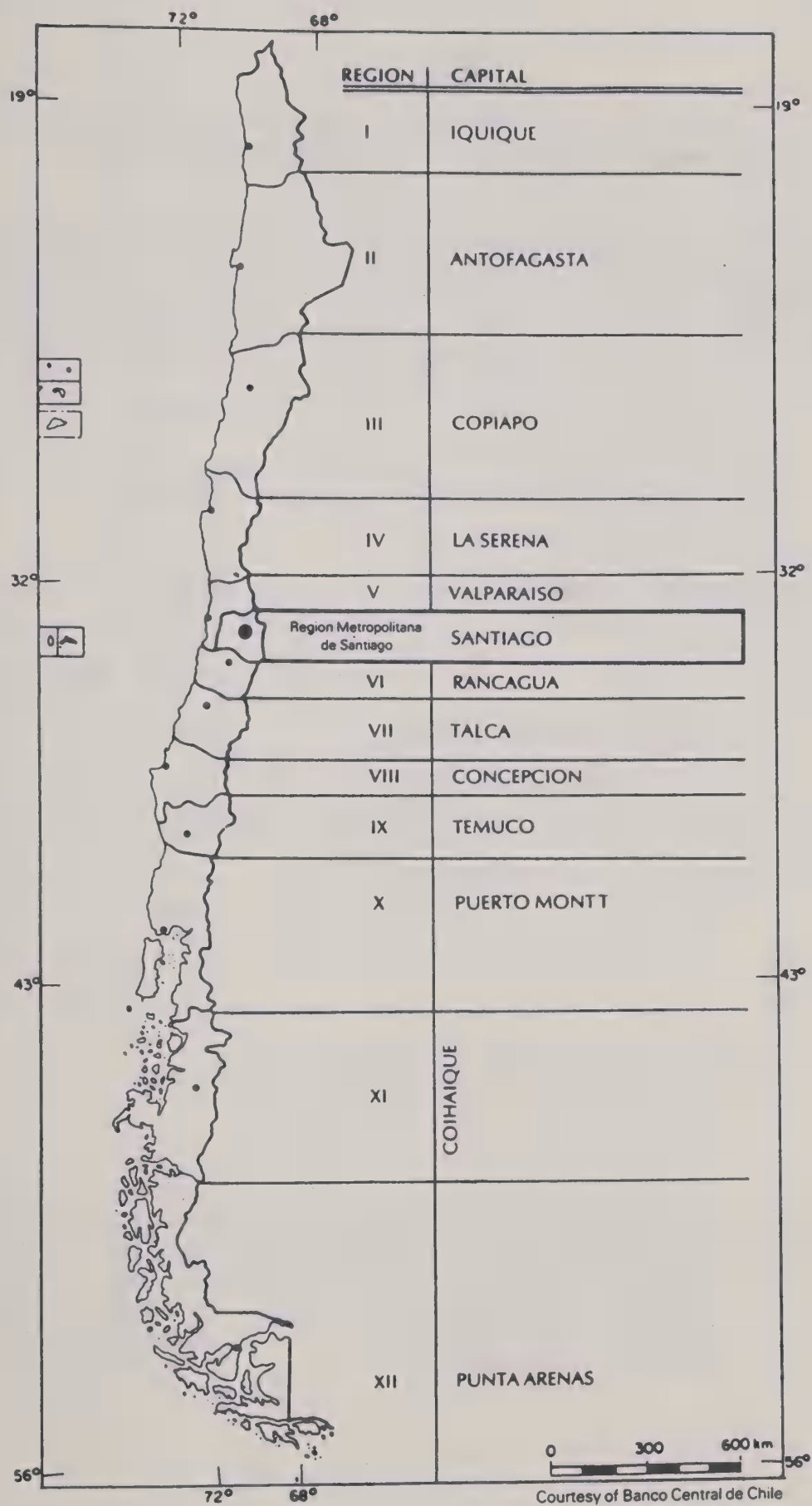
Chile will likely benefit from intensified efforts to open more export markets such as the opening of markets with Asia and anticipated free trade agreements with Mexico, Venezuela and possibly with the United States. Producers will likely increase their efforts to diversify into other types of fruits or commodities. The fresh fruit market already has a marketing network in place which may be used to sell related products such as jams and juices. Excess

and non-export quality fresh fruit is already processed into jams and juices for domestic consumption.

Information used in this article was based from the following:

- Chile: Annual Agricultural Situation Report, 1990, U.S. Embassy, Santiago, Chile, prepared by Robert Curtis.
- Chile, An Exporting Country for Fruit and Vegetables, International Fruit World in cooperation with ProChile, 1987.
- Chile Sectoral Outlook Report, Chilean Agriculture: Integrating Into World Markets, U.S. Embassy, May 1990, prepared by Mark Roberts and Carlos Capurro.
- Fresh Deciduous Fruit Annual, 1991, U.S. Embassy, Santiago, Chile, prepared by Robert Curtis and Luis Klocker.

(Joani Dong 202-447-4620)



Chile

CHILE

<u>Region</u>	<u>Climate & Irrigation</u>	<u>Commercial Deciduous/ Table Grape Production</u>	
I	Extremely dry. Small valleys with irrigation.	No table grapes or fresh deciduous fruit	
II	Extremely dry. Small valleys with irrigation.	No table grapes or fresh deciduous fruit	
III	Extremely dry. Small valleys with irrigation.	Grapes	
IV	Semi-dry. Large valleys with irrigation.	Grapes	
V	Semi-dry. Large valleys with irrigation.	Grapes Apples Pears Nectarines	
Metropolitan	Semi-dry. Fully irrigated.	Grapes	Nectarines
		Apples Pears	Peaches Apricots
VI - VIII	Semi-dry. Fully irrigated.	Grapes Apples Pears Nectarines Peaches	Apricots Cherries Plums Prunes
IX - X	Rainy. Fully irrigated (Fruit).	Apples Pears	

SOURCE: Chile Sectoral Outlook Report, Chilean Agriculture: Integrating Into World Markets, U.S. Embassy, May 1990, prepared by Mark Roberts and Carlos Capurro.

MAJOR DECIDUOUS FRUIT PRODUCTION BY REGION
Percent of Planted Area by Regions

The fruit production zone is located primarily in five regions. Deciduous fruit planted area is mostly located in the middle of the country with the majority concentrated in one or two Regions. Table grapes, however, are spread over five or six Regions.

Region: City:	IV La Serena	V Valparaíso	Metro. Santiago	VI Rancagua	VII Talca
Apples				[----- 96% -----]	
Pears			[----- 95% -----]		
Apricots		[----- 77% -----]			
Cherries					[- 60% -]
Peaches/Nectarines		[----- 79% -----]			
Table Grapes	[----- 82% -----]				
Plums/Prunes			[----- 79% -----]		

SOURCE: Fresh Deciduous Fruit Annual, 1991, U.S. Embassy, Santiago.

HARVEST DATES FOR CHILEAN COMMODITIES

Table Grapes	November - May
Apples	February - April
Pears	January - March
Plums/Prunes	November - May
Nectarines	November - March
Peaches	December - March
Cherries	October - January
Apricots	November - January

SOURCE: U.S. Embassy, Chile.

Chile: U.S. Imports of Table Grapes and Fresh Deciduous Fruit: CY 1970 - 1990

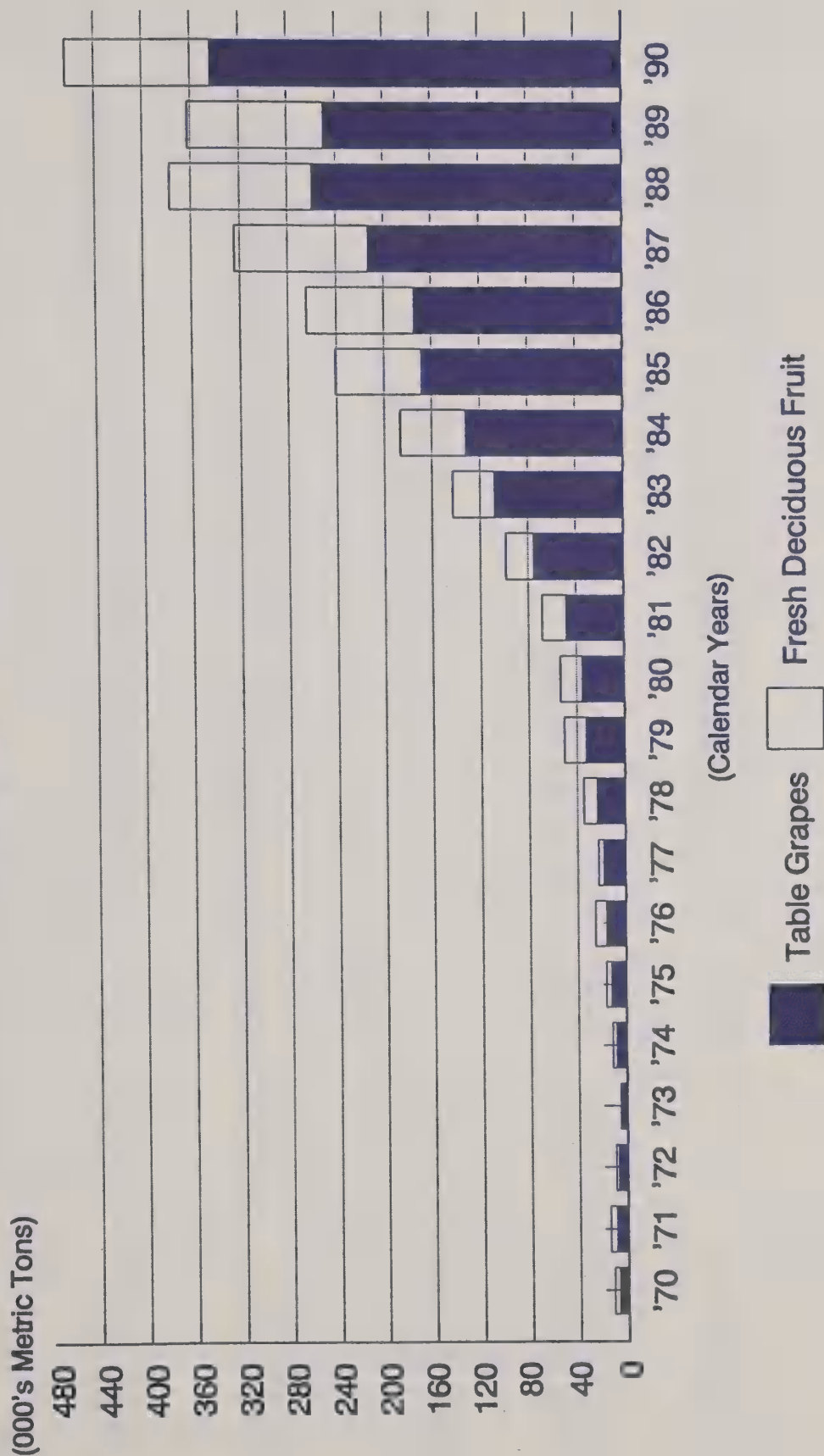
Calendar Year (CY)	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979
Table Grapes - Quantity (MT)	8,114	10,047	8,189	5,265	9,324	13,203	17,066	19,010	23,989	32,672
- \$Value	1,973,790	2,772,597	2,853,209	2,118,430	3,750,511	9,049,791	9,443,123	12,482,411	16,895,359	24,499,732
Apples - Quantity (MT)	0	4	23	0	32	600	1,756	441	3,948	11,947
- \$Value	0	600	3,500	0	6,750	165,314	509,052	141,422	1,614,273	4,100,981
Apricots	0	0	0	0	0	0	0	0	0	0
Cherries (Sweet & Sour)	16	3	0	0	0	59	22	14	0	0
7,823	2,000	0	0	0	0	72,168	28,464	14,315	0	0
Peaches/Nectarines	1,880	1,559	884	99	897	1,203	3,921	1,988	3,788	2,992
441,815	323,659	213,532	22,629	375,615	744,212	2,182,185	1,025,620	2,114,930	1,553,058	
Pears	947	2,146	469	121	797	1,304	2,097	1,305	1,646	2,349
108,477	312,110	71,824	28,843	164,175	382,438	541,964	333,085	573,361	861,010	
Plums/Prunes	1,315	1,263	743	197	613	647	1,258	707	1,415	1,266
317,888	302,323	220,249	59,162	240,409	413,252	757,582	407,204	928,296	809,555	
Fresh Deciduous Fruit Subtotal: Quantity	4,158	4,975	2,119	417	2,339	3,813	9,054	4,455	10,797	18,554
Fresh Deciduous Fruit Subtotal: \$Value	876,003	941,062	509,105	110,634	786,949	1,777,384	4,019,247	1,921,646	5,230,860	7,324,604
Total: Quantity . . .	12,272	15,022	10,308	5,682	11,663	17,016	26,120	23,465	34,786	51,226
Total: \$Value . . .	2,849,793	3,713,659	3,362,314	2,229,064	4,537,460	10,827,175	13,462,370	14,404,057	22,126,219	31,824,336
Calendar Year (CY)	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989
Table Grapes - Quantity (MT)	35,577	48,119	75,949	108,137	131,708	169,474	174,928	212,839	260,278	250,405
- \$Value	26,654,248	40,779,999	63,200,702	78,548,810	94,322,714	135,342,308	136,441,703	173,550,774	207,574,285	187,144,496
Apples - Quantity (MT)	10,167	12,706	10,256	14,782	26,538	22,225	31,041	43,020	38,762	26,989
- \$Value	3,008,319	5,050,076	4,008,629	5,388,537	11,081,733	7,489,833	10,913,710	17,027,858	15,240,147	8,436,828
Apricots	0	12	0	23	89	511	1,264	998	1,190	587
0	14,016	0	25,079	120,259	525,193	1,140,293	942,018	1,072,468	476,177	611,267
Cherries (Sweet & Sour)	22	36	103	409	523	658	695	751	1,451	1,637
22,410	82,107	300,739	631,167	861,426	961,699	1,104,357	1,346,104	1,871,170	1,794,641	1,678,077
Peaches/Nectarines	3,906	3,047	5,510	11,909	15,849	27,608	31,711	35,051	40,755	43,234
2,392,682	2,097,615	4,729,181	8,482,775	9,918,207	18,583,212	19,791,818	23,487,339	26,917,821	28,467,175	31,532,505
Pears	2,908	2,457	5,813	4,217	6,664	7,200	10,077	14,797	17,084	20,551
988,239	928,850	2,452,124	1,968,058	2,494,018	2,716,243	4,212,020	6,357,772	7,706,574	8,427,632	8,427,632
Plums/Prunes	1,583	1,502	1,567	3,791	5,933	13,678	15,511	18,041	18,001	20,080
1,150,251	1,171,029	1,641,526	3,548,932	4,572,670	10,551,176	9,298,426	11,178,276	10,953,419	13,056,076	14,632,477
Fresh Deciduous Fruit Subtotal: Quantity	18,586	19,760	23,249	35,131	55,596	71,880	90,299	112,658	117,243	113,078
Fresh Deciduous Fruit Subtotal: \$Value	7,561,901	9,343,693	13,132,199	20,044,548	29,048,313	40,827,356	46,460,624	60,339,367	63,761,599	58,995,555
Total: Quantity . . .	54,163	68,579	99,198	143,268	187,304	241,354	265,227	325,497	377,521	363,483
Total: \$Value . . .	34,216,149	50,123,692	76,332,901	98,593,358	123,371,027	176,169,664	182,902,327	233,890,141	271,335,884	246,140,051

SOURCE: U.S. Dept. of Commerce, Bureau of the Census

Chile: U.S. Imports of Table Grapes & Fresh Deciduous Fruit

CY 1970 - CY 1990

(000's Metric Tons)



SOURCE: U.S. Dept. of Commerce, Bureau of the Census

CHILE: TABLE GRAPES & FRESH DECIDUOUS FRUIT PRODUCTION AND UTILIZATION
(Metric Tons)
1980 - 1991

Commodity/ Mkting Year 1/	Area Planted (Hectares)	Production	Exports	Domestic Consumption 2/	Processing	Total Utilization
Table Grapes						
1980	13,500	85,000	49,848	17,152	18,000	85,000
1981	16,900	121,700	79,802	16,898	25,000	121,700
1982	20,300	152,000	109,244	17,756	25,000	152,000
1983	24,100	200,000	150,161	29,839	20,000	200,000
1984	28,700	230,000	178,419	36,581	15,000	230,000
1985	35,400	295,000	231,527	38,473	25,000	295,000
1986	38,800	307,500	231,300	31,600	44,600	307,500
1987	42,200	370,000	271,500	39,000	54,000	370,000
1988	43,500	490,000	350,000	49,000	85,000	490,000
1989	46,600	540,000	350,000	75,000	115,000	540,000
1990	48,800	630,000	464,000	75,000	91,000	630,000
1991	49,800	720,000	540,000	78,000	102,000	720,000
Apples						
1980	14,300	241,700	163,013	68,687	10,000	241,700
1981	15,500	293,400	190,000	93,900	9,500	293,400
1982	16,735	345,000	210,000	123,000	12,000	345,000
1983	17,600	365,000	179,295	155,705	30,000	365,000
1984	18,600	410,000	208,000	167,000	35,000	410,000
1985	19,000	450,000	202,862	172,138	75,000	450,000
1986	21,600	515,000	312,800	124,900	77,300	515,000
1987	22,200	580,000	331,000	120,000	123,500	580,000
1988	22,900	630,000	347,400	130,000	146,600	630,000
1989	24,800	660,000	327,000	160,000	173,000	660,000
1990	26,000	690,000	320,000	110,000	260,000	690,000
1991	26,200	730,000	335,000	110,000	285,000	730,000
Apricots						
1980	1,400	13,600	16	8,584	5,000	13,600
1981	1,400	13,000	17	8,483	4,500	13,000
1982	1,500	12,000	21	7,779	4,200	12,000
1983	1,500	13,500	69	7,431	6,000	13,500
1984	1,600	13,500	403	7,097	6,000	13,500
1985	1,600	14,000	700	7,300	6,000	14,000
1986	1,800	14,700	1,400	5,900	7,400	14,700
1987	1,900	11,800	810	4,790	6,000	11,800
1988	1,980	12,500	1,532	4,768	6,000	12,500
1989	2,210	14,000	1,500	6,000	6,300	14,000
1990	2,250	14,650	1,500	6,400	6,550	14,650
1991	2,300	15,500	1,500	7,000	6,800	15,500
Cherries (Sweet & Sour)						
1980	1,800	5,300	793	3,207	1,300	5,300
1981	2,100	5,900	749	4,151	1,000	5,900
1982	2,300	6,000	672	4,328	1,000	6,000
1983	2,400	7,000	677	5,823	500	7,000
1984	2,500	7,500	1,007	5,693	800	7,500
1985	2,600	8,500	1,150	6,350	1,000	8,500
1986	3,000	9,500	1,200	5,900	2,400	9,500
1987	3,300	6,250	1,140	3,210	1,500	6,250
1988	3,250	8,550	2,160	3,690	2,100	8,550
1989	3,500	10,600	2,900	4,500	3,200	10,600
1990	3,590	11,230	3,500	4,530	3,300	11,230
1991	3,800	12,300	4,200	4,600	3,500	12,300
Peaches/Nectarines						
1980	13,300	114,600	9,720	91,880	13,000	114,600
1981	13,900	101,700	9,195	77,505	15,000	101,700
1982	14,500	104,000	11,330	82,670	10,000	104,000
1983	14,300	130,000	16,341	99,659	14,000	130,000
1984	14,300	145,000	23,321	105,679	16,000	145,000
1985	14,400	155,000	34,000	101,000	20,000	155,000
1986	15,100	148,900	39,200	88,900	20,800	148,900
1987	15,500	147,000	44,400	77,200	21,000	147,000
1988	16,000	151,400	54,900	70,000	22,000	151,400
1989	17,000	162,400	56,300	78,100	25,000	162,400
1990	17,400	175,000	56,000	83,000	31,000	175,000
1991	17,800	185,000	59,000	86,000	35,000	185,000

CHILE: TABLE GRAPES & FRESH DECIDUOUS FRUITS PRODUCTION AND UTILIZATION
(Metric Tons)
1980 - 1991

Commodity/ Mkting Year 1/	Area Planted (Hectares)	Production	Exports	Domestic Consumption 2/	Processing	Total Utilization
Pears						
1980	3,300	39,100	22,368	13,232	5,500	39,100
1981	3,600	45,500	21,667	20,833	5,000	45,500
1982	3,900	45,000	25,630	16,370	3,000	45,000
1983	4,400	50,000	20,149	29,351	500	50,000
1984	4,800	56,000	27,947	27,553	500	56,000
1985	5,800	60,000	30,524	28,300	1,200	60,000
1986	7,600	78,000	45,000	31,800	1,200	78,000
1987	9,000	74,000	44,700	26,000	1,100	74,000
1988	9,450	95,000	63,000	27,600	2,000	95,000
1989	12,600	119,000	76,300	38,000	4,700	119,000
1990	13,900	139,000	91,000	42,000	6,000	139,000
1991	15,000	155,000	105,000	44,000	6,000	155,000
Plums/Prunes						
1980	3,700	17,000	3,383	1,617	12,000	17,000
1981	4,700	17,200	3,077	2,123	12,000	17,200
1982	5,500	17,000	3,048	1,952	12,000	17,000
1983	6,400	22,000	5,801	4,199	12,000	22,000
1984	7,200	28,000	8,790	5,710	13,500	28,000
1985	7,900	39,000	16,544	4,456	18,000	39,000
1986	8,400	50,000	19,200	13,800	17,000	50,000
1987	9,100	64,000	24,700	5,000	32,800	64,000
1988	9,000	75,000	26,000	6,500	41,000	75,000
1989	9,400	88,500	35,000	8,500	42,500	88,500
1990	9,600	92,500	35,000	10,000	45,000	92,500
1991	9,800	100,000	40,000	11,000	47,000	100,000

1/ Domestic Consumption includes waste and loss.

2/ Marketing years start as follows:

Table Grapes - December of year previous to one shown

Apples - February of the year shown

Apricots - November of year previous to one shown

Cherries - November of year previous to one shown

Peaches/Nectarines - January of the year shown

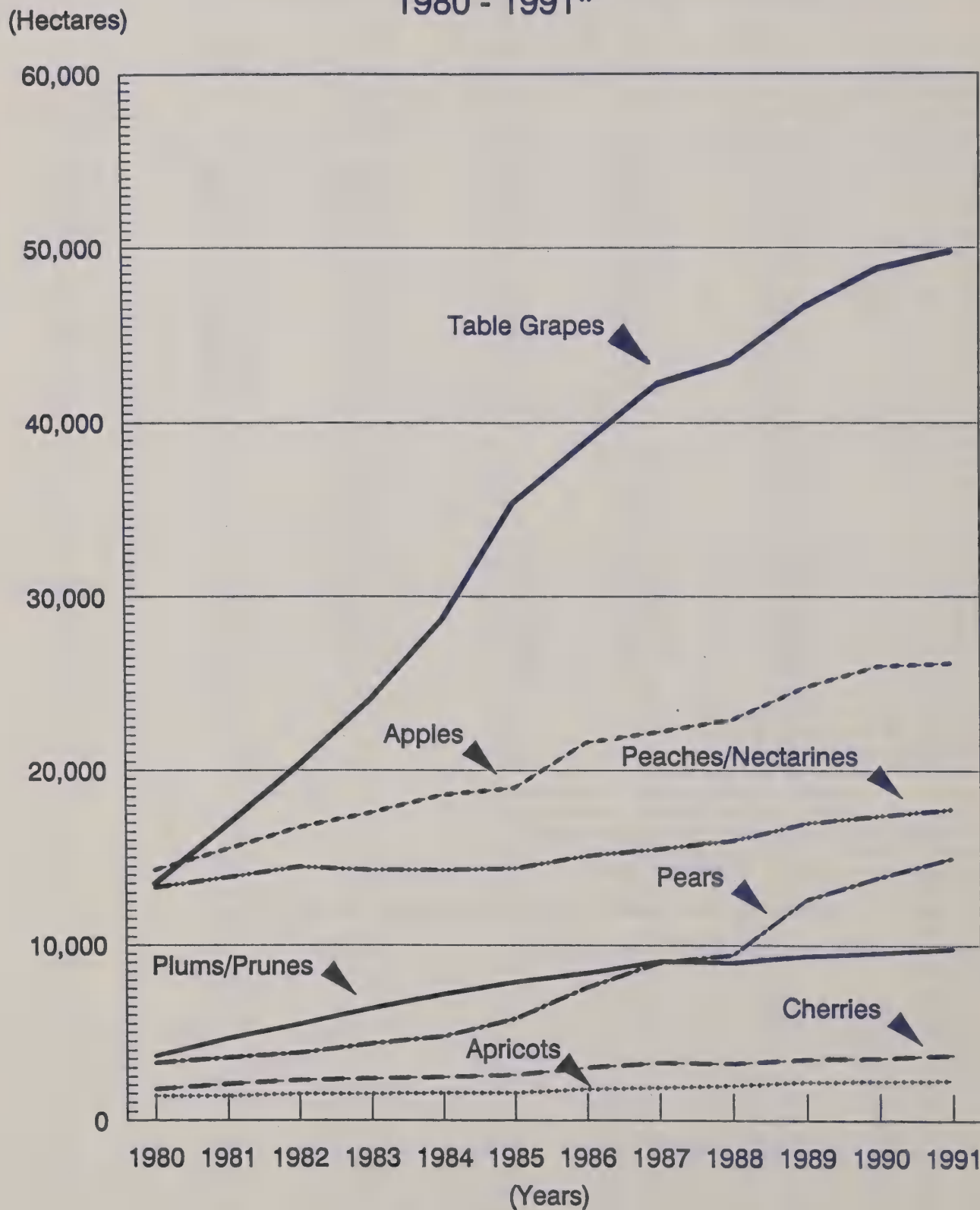
Pears - January of the year shown

Plums/Prunes - January of the year shown

Note: 1991 data are preliminary, based on data originally published in February 1991.

SOURCE: Foreign Agricultural Service Attache Reports

Chile: Table Grapes and Deciduous Fruits Area Planted in Hectares 1980 - 1991*



SOURCE: FAS Attache Reports

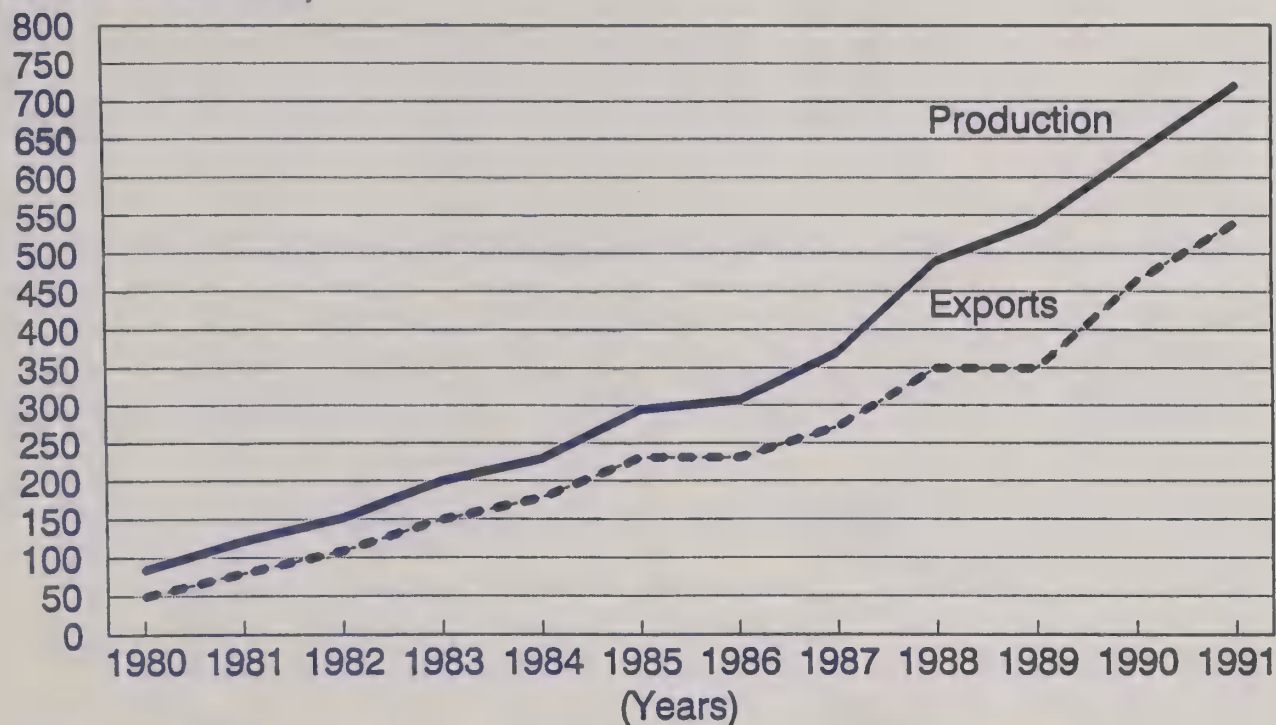
* 1991 data are preliminary.

Chile: Production vs. Exports

I. Table Grapes

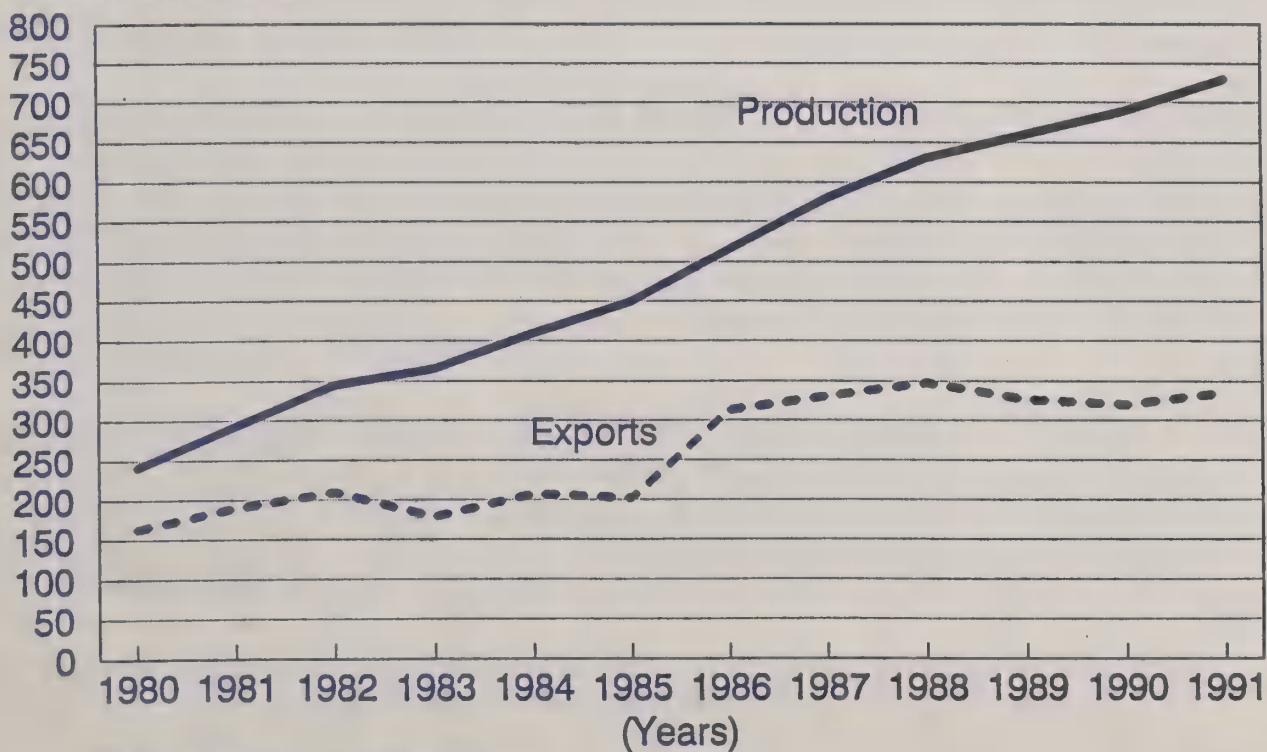
1980 - 1991*

(000's Metric Tons)



II. Apples

(000's Metric Tons)



SOURCE: FAS Attache Reports

* 1991 data are preliminary.

THE U.S.-EC CANNED FRUIT AGREEMENT

The 1990/91 canned peach and pear season was the first in which the European Community (EC) was committed to set its support levels in accordance with the revised methodology under the U.S.-EC Canned Fruit Agreement. According to the methodology agreed to in 1989, the EC's subsidies to processors would not give the EC an unfair advantage over other exporters of canned peaches and pears during marketing year 1990/91. EC grower prices and processing aids for the current season also are expected to comply with the terms of the agreement.

Background

Based on proposals from the European Commission, the EC Council of Agriculture Ministers each year fixes the common agricultural prices applicable to the following marketing year for each commodity. The Minimum Grower Prices (MGPs) that have been established for peaches and pears used for processing have routinely been set above the prices farmers received in other, non-subsidizing, major producing countries. Therefore, under this system, fruit processors in the EC pay more for these fresh fruits than processors in other countries. In order to compensate EC fruit processors for the relatively higher price they are obliged to pay for raw material, the EC provides them with a subsidy, called a "processing aid."

In the early 1980's, the United States determined that this processing subsidy more than offset the high cost of fruit purchased by EC processors, and effectively subsidized part of the processing operation itself, allowing the EC to undercut U.S. canned fruit prices in markets around the world. After receiving a report favorable to a complaint concerning these subsidies at the General Agreement on Tariffs and Trade (GATT) in 1983, the United States and the EC reached a separate, bilateral agreement resolving this dispute on November 30, 1985.

Under the terms of the U.S.-EC Canned Fruit Agreement, the EC pledged to limit the amount of its subsidies to EC peach canners "so as not to subsidize the processing operation," but only to compensate EC peach canners for the higher price of EC fresh peaches. This agreement achieved the result recommended by the GATT panel. In addition, although canned pears were not mentioned specifically in the Canned Fruit Agreement, the United States accepted previous reductions in the processing subsidy for canned pears as a settlement for U.S. complaints.

However, subsequent non-compliance by the EC with the Canned Fruit Agreement led to further negotiations which ended in the adoption of a revised methodology to determine compliance. On July 28, 1989, the EC passed legislation limiting future subsidies on canned peaches and pears so that the cost of fruit to EC processors is no less than the world trade-weighted average price.

The world price for peaches is calculated by using the price processors paid for fresh peaches during the marketing year in question, in the four major non-EC exporting countries; South Africa, Australia, Chile, and the United States. A trade-weighted average is then calculated using each of these prices converted into U.S. dollars and multiplied by the amount of canned peach exports for that country from the previous marketing year. The formula

for pears is the same as for peaches except Chilean prices and exports are not used. These price calculations are then submitted to the European Commission to assist their internal negotiations on setting subsidy levels such that the net cost of the fruit to processors is equal to the world price.

Green Rates in the European Monetary System

The commodity prices established each year by the EC are first set in European Currency Units (ECU) and then translated into different national currencies. The ECU is a "basket" consisting of specified amounts of the Member States' currencies. The day-to-day market value of the ECU is determined by taking a representative market exchange rate against the dollar for each currency.

When a Member State's exchange rate vis-a-vis the ECU shifts, its agricultural prices (set in ECUs but expressed in local currencies) should also change. However, because currency fluctuations affect the stability of producers' incomes and the level of food prices, the Member States have a system of "green rates" for the common agricultural market. The green rates for agricultural commodities are often substantially different from the market rate. This divergence between green and market exchange rates may suit a Member State, because an overvalued green rate results in low food prices to appease consumers during inflationary times. Conversely, undervalued green rates result in higher consumer prices but increase farmers incomes, a position many countries with large agricultural sectors, such as Greece, prefer.

Green conversion rate changes have become a major part of the annual fixing of EC support prices. Often a green conversion rate devaluation has had more impact on a Member State's national prices than has the change in ECUs.

Green Rates and EC Fruit Prices

According to EC regulations, MGPs and processing subsidies must be the same in ECUs for all countries. However, green rate differences can cause processors' net cost of fruit to be different. To compensate for this, the Canned Fruit Agreement stipulates that a coefficient can be applied to the processor's subsidy to compensate for the green rate gap. This coefficient is determined by dividing the difference between the MGP and the world price by the subsidy.

Implications for Trade Flows

Greece is the world's largest exporter of canned peaches. Together, the EC countries comprise a dominant force in the world canned pear market. Maintaining EC production costs for these commodities at a subsidized level below the world price implies disruptions in trade and production in other producing countries. It is estimated that the EC advantage cost the United States an average of \$15.5 million dollars in lost sales per year from 1986 - 1988, with approximately half that value attributable to loss of third country markets and half to EC imports from the United States. It is too soon to gauge the impact of EC compliance with the Canned Fruit Agreement. However, the United States will continue to assess the impact of EC policies in an effort to cooperate with the EC on maintaining fair trade in the world canned fruit market.

(Amy Brooksbank, 382-8911)

U.S. CANNED PEACH TRADE 1987 - 1989
(Metric Tons)

COUNTRY	1987	1988	1989
<u>Exports</u>			
CANADA	1,667	2,190	1,273
JAPAN	8,775	8,687	8,052
TAIWAN	1,881	3,583	2,095
OTHER	3,209	3,977	4,470
TOTAL	15,532	18,437	15,890
<u>Imports</u>			
AUSTRALIA	2,965	923	0
CHILE	4,262	9,182	11,502
GREECE	9,019	23,251	24,216
OTHER	3,226	7,959	8,908
TOTAL	19,472	41,315	44,626

Source: U.S. Department of Commerce, Bureau of the Census

GREECE - CANNED PEACH EXPORTS 1987 - 1989
(Metric Tons)

COUNTRY	1987	1988	1989
FRANCE	20,452	10,144	18,143
GERMANY	71,289	47,031	72,194
ITALY	3,693	--	--
NETHERLANDS	13,095	7,234	8,244
UNITED KINGDOM	40,096	22,791	22,402
OTHER EC	8,757	9,336	19,448
EC SUBTOTAL	157,382	96,536	140,431
AUSTRIA	--	2,368	4,624
CANADA	--	4,885	12,780
JAPAN	15,046	8,852	15,851
UNITED STATES	9,019	23,251	24,216
OTHER NON-EC	29,454	9,043	16,057
TOTAL	210,901	144,935	213,959

Sources: For exports to the United States - U.S. Department of Commerce, Bureau of the Census; for exports to all other destinations, Foreign Agricultural Service Attache Reports.

THE MARKET STRUCTURE AND PROSPECTS FOR U.S. HORTICULTURAL EXPORTS TO HONG KONG

Agriculture contributes less than 1 percent of Hong Kong's Gross Domestic Product and that percentage will likely decrease as Hong Kong's agricultural industry continues to decline as a result of high rent, labor shortages, and increasingly restrictive pollution controls. The bulk of Hong Kong's food and agricultural needs have to be met by imports. This offers excellent opportunities for further expansion of U.S. agricultural exports to Hong Kong.

Hong Kong imported over \$750 million C.I.F. of fresh fruits and vegetables in 1990; U.S. exports of fresh produce to Hong Kong represented \$132 million F.O.B. The United States is the number one supplier of fresh fruit to Hong Kong. Hong Kong takes about one-tenth of total U.S. offshore exports of citrus and non-citrus fruits. The territory is among the top three U.S. export markets for oranges, apples, grapes, tomatoes, celery, lettuce, peppers, and onions.

Clearly, the market for U.S. fresh fruits and vegetables in Hong Kong is already strong. Room for growth exists, however, if U.S. exporters are attentive to the changing market conditions and the dynamics of cultural and culinary habits of the local population.

Market Structure

Hong Kong is virtually an open market. There are no import tariffs for fresh produce items and regulations pertaining to food safety and standards have generally not posed problems for U.S. food exports.

Like many markets in Asia, the market structure in Hong Kong is comprised of many players at all levels of distribution. (See diagram on next page.)

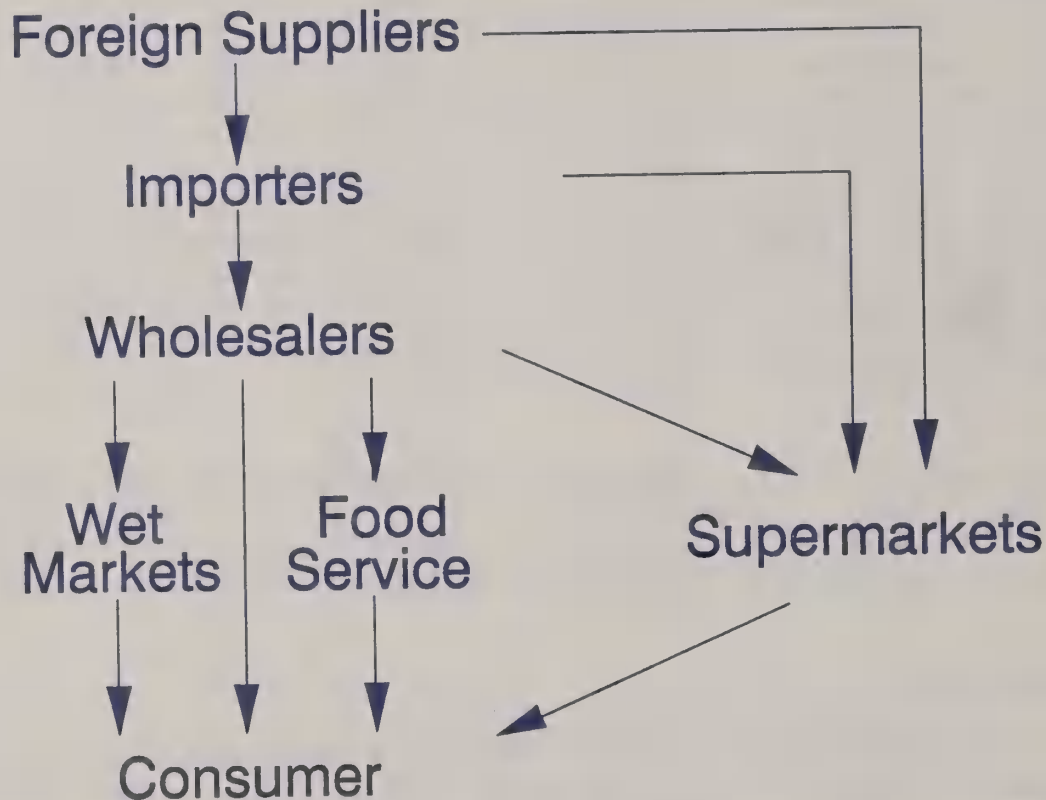
Importers and Wholesalers

Two wholesale markets exist, one in Kowloon and one on Hong Kong island. These markets are old and traditional, housing many small, individual wholesalers and importer/wholesalers. Wholesalers sell to all levels of the retail market: wet markets, supermarkets, restaurants, fast food chains, and directly to the consumer.

Retailers

As in Singapore and Malaysia (see March 1991 circular), wet markets in Hong Kong still have an extremely important function for fresh produce distribution. These wet markets are comprised of individually owned stalls grouped together where hawkers sell everything from fruits and vegetables to sweets, poultry and eggs. Today, about 90 percent of all fresh produce is sold in the wet markets and about 10 percent in the supermarkets. There are over 1,500 wet markets and

Market Structure Hong Kong



food stalls in Hong Kong. The size of the individual stall limits the types of promotional materials which can be used and activities which can be carried out. For promotions, T-shirts, printed shopping bags, stickers, stringers, and other small point-of-sale material can be used at the wet market level. Merchandisers are critical for an effective marketing program.

While the bulk of the fresh produce is sold in the wet markets, supermarkets are becoming increasingly important. The Hong Kong population is extremely young, having a mean age of 25.3 years, with 43 percent of the people still in school. This segment is westernizing quickly. With that development comes an increase in the use of supermarkets, as the traditional shopping habit of going to various stalls in the wet market twice a day is shed in favor of one-stop shopping a couple of times a week.

It is estimated that, in the long run, supermarkets have the potential to garner upwards of 20 percent of the fresh produce business. This represents a huge volume, as the Hong Kong population consumes an enormous amount of fresh produce; e.g., it is the largest consumer of oranges in the world on a per capita basis. Two major supermarket chains exist in Hong Kong: Wellcome and Park 'n' Shop. Wellcome, with 150 stores, is the largest chain, while Park 'n' Shop, with 130 stores, is the most innovative in produce marketing.

In recent years, the competition for the consumer's supermarket dollar has increased due to the advent of Japanese supermarkets in the area. These markets are geared to the middle-upper income levels and are more receptive to sourcing products from non-traditional suppliers. As these stores are generally larger, they offer greater opportunity to build larger displays.

A huge labor deficit makes it difficult for supermarkets to maintain high-quality, fresh-looking produce sections. At Chinese New Year, supermarkets have to pay twice the wages which are normally demanded.

In promoting fresh produce in supermarkets, point-of-sale material, recipes, leaflets, and individual and innovative packaging are considered extremely effective. For packaging multiple pieces, retailers must keep in mind some important Chinese customs. For example, 8-packs are popular, as eight is a lucky number; similar significance is placed on certain other numbers. In-store sampling programs and the inclusion of premiums, such as fruit slicers for apples and pears, spoons for kiwi, orange peelers and the like can also increase sales. Television campaigns are considered almost essential.

The Current Market Situation

Hong Kong is a huge market for a variety of U.S. fresh produce items (see Table). Oranges are the clear favorite, however, commanding \$53.6 million of the total of \$117 million of fresh fruit imported from the United States in 1990. Citrus fruits, which include oranges, lemons, grapefruits and tangerines, account for about 40 percent of Hong Kong's fruit imports. Apples, grapes, lemons, plums, melons, and cherries are also very popular fruits. The United States is the largest citrus fruit supplier, accounting for over 85 percent of the total. In Hong Kong, large and medium-sized fruits are preferred. This is in contrast to Singapore and Malaysia, where the demand is for small-sized fruit.

Hong Kong is the second largest offshore market for U.S. apples after Taiwan in terms of overall volume. On a per capita basis, the volume in Hong Kong is almost double what it is for Taiwan. Imports of apples are expanding outside of the traditional Red Delicious variety to include Granny Smiths and Goldens. Goldens are new to Hong Kong and the response from sampling has been good. Importers will need to be persuaded to bring more in as Goldens are difficult to store and the importers do not want to take the risk of dealing with such a fragile fruit. The Fuji apple is not successful here as it is often mistaken for an inexpensive, Chinese-type apple.

On the fresh vegetable side, lettuce, both head and leaf varieties, represents 40 percent of the \$15 million of U.S. vegetable imports. Celery, tomatoes, and onions are also very popular, commanding 26 percent of total U.S. vegetable imports.

For advertising, in all sectors and all areas the competition for non-television ("below-the-line") advertising is keen. Recently cigarette advertisements were banned from television, so cigarette companies are redirecting large advertising budgets to buy poster spots in subways, build magazine advertising campaigns, and generally carry out considerable below-the-line advertising, driving up the price and decreasing space availability for other products.

Issues for the Future

Hong Kong's ownership will return to China in 1997. Currently, China has extremely restrictive quarantine rules for fresh produce, with the main concern apparently being the Mediterranean fruit fly. Starchy vegetables, citrus, potatoes, and some deciduous fruits are the principal products not permitted entry into China at this time.

The issue for the future is whether these restrictive quarantine rules will be applied to Hong Kong in 1997. If these restrictions are imposed, the United States would lose a \$50-million market in oranges alone.

(Bonnie Borris, 202-447-6086)

U.S. EXPORTS OF FRUITS AND VEGETABLES TO HONG KONG (VALUES IN \$1,000)

Product	1986	1987	1988	1989	1990
Oranges	70,372	49,107	41,297	54,492	54,422
Grapes	14,509	11,014	15,638	18,739	21,127
Apples	13,180	13,545	15,911	16,634	21,089
Lettuce	4,225	4,632	6,609	7,282	7,538
Plums/prunes	7,557	9,789	6,320	6,300	5,887
Lemons	3,090	3,881	3,931	3,991	4,609
Other melon	4,173	4,214	3,368	2,853	4,360
Sweet cherries	3,021	4,604	2,525	4,616	2,163
Celery	1,963	1,936	2,527	2,088	2,027
Onions	1,587	1,175	1,590	1,097	1,084
Tomatoes	1,580	1,665	1,746	1,211	860
Peaches/nectarines	23	176	528	317	804
Grapefruit	795	1,593	1,457	608	747
Broccoli	0	51	229	257	586
Pears	362	966	395	243	542
Kiwifruit	100	298	425	518	515
Other fresh fruits and vegetables	5,011	8,575	8,611	3,438	3,582
Total fresh fruits and vegetables	131,608	117,221	113,107	124,685	131,940
Processed and dried fruits and vegetables	52,618	57,336	55,942	73,134	85,668
Total fruits and vegetables	184,226	174,557	169,049	197,819	217,609

PRUNES: PRODUCTION, SUPPLY, AND DISTRIBUTION
SELECTED COUNTRIES 1988/89 - 1990/91¹
(METRIC TONS, PACKED WEIGHT)

COUNTRY	MARKETING YEAR	BEGINNING STOCKS	PRODUCTION	IMPORTS	TOTAL SUPPLY	EXPORTS	DOMESTIC CONSUMPTION	ENDING STOCKS	TOTAL DISTRIBUTION
Argentina ²	1988/89	396	7,500	0	7,896	5,308	1,800	788	7,896
	1989/90	788	8,000	0	8,788	6,000	1,800	988	8,788
	1990/91	988	9,000	0	9,988	7,000	1,800	1,188	9,988
Australia ³	1988/89	1,700	3,357	1,273	6,330	250	4,300	1,780	6,330
	1989/90	1,780	2,700	1,270	5,750	227	4,350	1,173	5,750
	1990/91	1,173	2,800	1,270	5,243	250	4,350	643	5,243
Chile ²	1988/89	3,814	10,000	0	13,814	12,369	960	485	13,814
	1989/90	485	13,800	0	14,285	12,993	962	330	14,285
	1990/91	330	11,500	0	11,830	10,665	965	200	11,830
France ^{4/}	1988/89	6,497	41,494	2,411	50,402	10,373	26,577	13,452	50,402
	1989/90	13,452	19,949	8,586	41,987	7,000	26,187	8,800	41,987
	1990/91	8,800	33,000	2,500	44,300	9,500	26,500	8,300	44,300
South Africa ^{5/}	1988/89	1,627	2,901	0	4,528	192	2,719	1,617	4,528
	1989/90	1,617	3,512	0	5,129	79	2,828	2,222	5,129
	1990/91	2,222	2,500	0	4,722	110	2,850	1,762	4,722
United States ^{6/}	1988/89	70,599	143,835	523	214,957	57,697	103,745	53,515	214,957
	1989/90	53,515	215,275	500	269,290	76,228	108,750	84,312	269,290
	1990/91	84,312	140,025	500	224,837	78,000	103,500	43,337	224,837
Yugoslavia ^{7/}	1988/89	853	12,873	0	13,726	9,393	2,300	2,033	13,726
	1989/90	2,033	12,148	0	14,181	6,000	3,000	5,181	14,181
	1990/91	5,181	7,000	0	12,181	7,000	3,200	1,981	12,181
Grand total	1988/89	85,486	221,960	4,207	311,653	95,582	142,401	73,670	311,653
	1989/90	73,670	275,384	10,356	359,410	108,527	147,877	103,006	359,410
	1990/91	103,006	205,825	4,270	313,101	112,525	143,165	57,411	313,101

¹ 1990/91 figures are forecast. Southern Hemisphere prunes are harvested early in the second of the split years shown. ² Marketing years begin in January 1. ³ Marketing year begins March 1. ⁴ Marketing years begin September 1. ⁵ Marketing years begin September 1. ⁶ U.S. production estimates on a natural basis for 1988/89, 1989/90, and 1990/91 respectively, are 140,615, 185,975, and 139,700 metric tons. Marketing years begin August 1. U.S. exports from Prune Administrative Committee. ⁷ Marketing year begins October 1. (Mark Thompson - 202 447 6877)

June 1991

Horticultural and Tropical Products Division, FAS/USDA
Production Estimates and Crop Assessment Division, FAS/USDA

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED
MAR 91

COMMODITY AND COUNTRY		QUANTITY				VALUE (1,000 DOLLARS)					
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FRESH FRUIT											
FR. APPLES(JUL) MT											
TAIWAN		5,014	3,714	55,120	53,909	67,484	2,436	2,276	24,349	32,881	29,340
CANADA		7,120	7,420	43,437	56,784	66,618	4,740	5,631	25,406	41,955	39,397
HONG KONG		4,769	5,323	30,472	32,967	40,556	2,183	2,823	14,735	17,763	19,807
EC-12		5,098	4,426	25,740	34,893	33,832	2,293	2,723	11,789	19,271	15,579
UNITED KINGDOM		8,851	3,978	19,493	26,522	25,542	2,172	2,475	9,349	14,861	12,215
SAUDI ARABIA		115	191	16,973	21,292	17,012	114	110	7,479	13,255	7,505
OTHER		5,424	5,900	90,037	102,643	107,821	2,667	3,740	44,302	61,327	54,419
Subtotal:—		27,140	26,974	261,779	302,509	333,322	14,435	17,303	128,061	186,452	166,046
FR. PEARS(JUL) MT											
CANADA		1,933	1,074	23,737	32,616	29,249	1,467	1,453	13,503	21,981	17,675
MEXICO		2,760	2,542	18,627	17,748	27,125	1,236	1,214	11,506	8,163	12,448
EC-12		157	134	8,397	8,421	9,191	183	6	3,702	4,687	4,145
SWEDEN		35	0	9,215	9,734	8,751	14	0	3,701	7,711	2,814
NETHERLANDS		122	19	5,938	4,531	6,077	169	8	5,624	3,447	2,708
OTHER		125	178	10,178	20,261	11,110	244	235	5,554	11,829	6,312
Subtotal:—		5,411	4,928	69,154	88,781	85,227	3,144	2,967	34,046	51,371	43,393
APRICOTS(MAY) MT											
CANADA		5	0	2,146	2,734	2,146	7	0	1,695	3,142	1,695
MEXICO		13	12	1,291	1,181	1,291	13	10	1,005	792	1,005
OTHER		0	39	344	705	422	0	67	515	905	595
Subtotal:—		18	51	3,820	4,620	3,859	19	77	3,216	4,859	3,297
FR. CHERRIES(MAY) MT											
JAPAN		13	0	11,169	7,350	11,169	12	0	40,469	37,321	40,469
CANADA		20	28	7,159	6,489	7,177	29	36	9,469	13,153	9,492
EC-12		30	110	3,806	7,419	3,985	37	90	7,682	12,541	7,809
UNITED KINGDOM		0	0	3,109	3,641	3,109	0	0	6,354	7,333	6,354
HONG KONG		0	0	2,735	1,039	2,735	0	0	4,616	2,163	4,616
OTHER		17	61	2,019	1,473	2,039	6	215	3,577	3,678	3,577
Subtotal:—		80	199	26,907	23,769	27,104	84	341	65,813	68,856	65,963
PEACH-NECTRN(MAY) MT											
CANADA		399	352	32,229	45,839	31,490	483	483	18,876	45,311	19,211
MEXICO		369	406	9,575	8,321	10,067	245	289	5,100	4,169	5,152
OTHER		18	86	2,898	1,647	2,924	32	178	2,586	4,589	2,606
Subtotal:—		786	844	45,102	57,807	45,481	760	950	26,562	54,169	26,989
PLUM-FRUMES(MAY) MT											
TAIWAN		0	0	21,785	31,806	21,785	0	0	14,851	30,119	14,851
CANADA		288	245	16,280	25,300	16,373	310	322	9,677	26,511	11,823
HONG KONG		0	101	7,310	6,143	7,510	0	41	3,300	5,943	3,300
EC-12		0	20	4,344	4,314	4,344	0	35	1,767	5,176	1,767
UNITED KINGDOM		0	0	3,390	3,390	3,390	0	0	3,322	4,749	3,322
MEXICO		157	336	3,441	3,258	3,570	213	204	1,156	1,816	1,250
OTHER		67	17	3,293	3,811	3,293	110	33	1,056	3,947	1,056
Subtotal:—		712	722	56,654	74,801	56,875	654	641	39,808	73,512	40,041
FR. AVOCADOS(OCT) MT											
CANADA		192	81	1,151	1,169	2,954	304	132	1,539	1,460	4,495
JAPAN		77	143	171	143	160	129	192	253	192	2,157
EC-12		0	14	669	91	842	0	30	811	86	1,051
UNITED KINGDOM		0	14	347	44	472	0	30	405	61	584
OTHER		6	3	25	18	74	9	9	39	42	116
Subtotal:—		275	241	2,016	1,422	4,830	442	363	2,642	1,780	7,820
FR. KIWIFRUIT(OCT) MT											
CANADA		720	711	4,252	3,492	6,272	962	1,075	4,801	4,990	8,102
TAIWAN		1,032	265	1,879	1,825	2,363	1,809	494	3,213	1,556	4,108
OTHER		411	228	1,216	1,114	1,639	651	324	1,843	1,722	2,496
Subtotal:—		2,163	1,241	7,347	5,431	10,274	3,422	1,897	9,856	8,268	14,706
FRESH GRAPES (MAY) MT											
CANADA		1,255	1,160	61,471	127,815	62,497	1,292	1,651	57,573	128,993	58,675
HONG KONG		0	0	18,708	21,545	18,708	0	0	16,451	22,182	16,451
TAIWAN		14	0	11,446	14,714	11,863	13	0	11,274	11,842	11,841
OTHER		539	231	35,418	42,198	35,731	448	255	41,590	51,540	41,847
Subtotal:—		1,808	1,391	127,443	206,277	128,799	1,753	1,906	126,891	217,358	128,257
FR. STRAWBRIS(JAN) MT											
CANADA		2,596	2,508	5,115	4,360	31,209	4,391	5,049	9,065	9,186	46,654
JAPAN		0	0	0	0	1,520	0	0	0	0	15,027
OTHER		81	157	377	558	1,157	246	443	1,025	1,777	5,600
Subtotal:—		2,677	2,665	5,491	4,918	33,887	4,637	5,492	10,091	10,963	67,385
FR. ORNG INC TMPL(NOV) MT											
CANADA		24,251	6,547	82,806	60,155	177,598	10,902	4,407	40,770	36,869	83,369
JAPAN		10,328	7,198	32,627	23,351	143,879	6,228	7,044	21,525	21,351	90,086
HONG KONG		11,001	3,099	43,124	19,399	113,364	5,698	1,653	22,022	10,466	56,369
OTHER		8,626	2,905	26,145	10,780	64,763	4,427	1,576	14,451	5,859	34,532
Subtotal:—		54,206	19,750	184,701	113,685	495,604	27,255	14,679	98,769	74,544	264,356
FR. GRPFR(TSEP) MT											
JAPAN		27,213	43,323	100,312	148,886	148,514	18,307	29,578	60,056	99,160	80,370
EC-12		8,976	12,143	70,037	110,710	82,770	4,529	6,418	34,500	55,523	39,250
CANADA		4,748	5,970	25,107	55,569	38,801	2,781	4,943	14,304	26,477	11,873
FRANCE		4,788	9,917	33,936	47,984	35,994	2,262	3,203	15,289	24,085	17,437
NETHERLANDS		3,348	6,552	17,663	37,749	27,013	1,786	1,764	8,983	18,708	12,016
OTHER		3,023	3,149	8,530	10,391	17,244	1,553	1,607	4,310	5,644	9,211
Subtotal:—		43,960	68,585	203,986	325,556	287,330	27,169	42,545	113,150	186,803	160,803

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED
MAR 91

COMMODITY AND COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FR TANGERINES (NOV)	MT										
CANADA		591	602	4,350	5,266	5,520	486	609	3,955	5,854	5,228
EC-12		195	16	507	520	507	153	16	408	484	408
OTHER		49	18	375	154	440	41	19	368	141	392
Subtotal:—		835	636	5,232	6,939	6,466	679	644	4,731	6,479	6,028
CANNED FRUIT											
CND PEACH&NECT (JUN)	MT										
JAPAN		227	693	4,716	5,365	5,850	1,007	850	4,975	5,669	6,206
MEXICO		126	5	1,284	541	1,653	85	4	1,054	384	1,346
TAIWAN		77	154	1,227	2,141	1,569	66	98	946	1,662	1,216
CANADA		111	125	893	1,380	1,183	141	170	902	1,669	1,259
SINGAPORE		93	27	626	456	941	69	25	514	411	732
PHILIPPINES		32	31	672	349	755	34	29	720	297	799
OTHER		250	282	2,129	1,218	2,406	241	247	1,942	3,103	2,210
Subtotal:—		1,515	1,315	11,548	14,449	14,358	1,642	1,424	11,053	13,196	13,767
CND PEARS (JUN)	MT										
JAPAN		58	4	363	35	442	35	121	311	940	424
MEXICO		30	0	340	36	362	27	0	271	202	289
CANADA		12	112	220	399	259	12	122	182	420	220
TAIWAN		0	0	124	38	124	0	0	96	118	96
OTHER		114	24	485	60	601	107	27	462	885	545
Subtotal:—		214	219	1,531	2,067	1,787	181	271	1,321	2,565	1,574
CND PNEAPL (JAN)	MT										
CANADA		106	342	373	679	2,555	83	333	308	619	1,875
JAPAN		40	206	98	447	1,959	47	208	116	460	1,764
EC-12		147	105	479	646	1,691	102	86	359	474	1,556
GERMANY		30	14	224	334	810	22	7	202	265	730
NETHERLANDS		117	91	240	167	587	81	79	148	144	407
KOREA, REPUBLIC		45	26	78	26	459	44	28	75	28	359
OTHER		87	31	108	117	360	76	24	98	95	344
Subtotal:—		425	710	1,136	1,916	7,024	352	880	956	1,676	5,699
FRT MIXTURES (JUN)	MT										
CANADA		509	672	2,852	5,837	3,830	644	836	3,112	7,062	4,350
JAPAN		412	434	2,547	3,770	3,373	572	645	2,742	4,269	3,665
PHILIPPINES		134	44	2,561	2,468	2,905	150	52	2,356	2,554	2,785
SINGAPORE		261	73	1,497	1,767	1,798	259	78	1,514	1,633	1,840
OTHER		535	969	5,966	8,187	7,193	514	623	6,026	6,852	7,458
Subtotal:—		1,851	2,192	15,423	22,029	19,097	2,139	2,234	15,750	22,370	20,098
DRIED FRUIT											
DRD PALSINS (AUG)	MT										
EC-12		4,087	5,799	30,419	44,345	46,316	6,136	7,490	45,452	55,437	68,124
UNITED KINGDOM		1,903	2,619	14,704	18,972	22,523	2,892	3,505	21,641	23,652	32,094
JAPAN		567	1,895	15,009	14,910	19,751	856	2,524	23,343	20,218	30,538
GERMANY		1,026	1,409	6,328	12,142	10,407	1,442	1,667	9,382	14,360	14,834
CANADA		1,021	684	3,943	7,798	7,431	2,155	1,310	9,602	16,035	16,348
SWEDEN		389	645	4,344	5,790	6,107	636	752	7,414	7,957	10,337
OTHER		1,431	1,531	16,158	19,997	22,797	2,242	1,211	26,156	27,734	37,767
Subtotal:—		7,494	10,554	69,872	92,840	102,401	12,025	11,287	111,967	127,381	163,115
DRD PRUNES (AUG)	MT										
EC-12		2,927	6,146	28,687	40,197	39,241	4,828	7,036	47,466	51,141	65,387
ITALY		560	972	9,110	9,291	11,391	1,176	1,381	15,558	14,259	20,160
JAPAN		644	1,080	7,428	9,837	10,736	792	1,505	10,465	11,765	14,801
GERMANY		1,065	2,142	6,513	12,581	10,490	1,881	2,491	11,354	15,368	17,972
FRANCE		384	17	5,458	1,007	5,922	539	27	7,631	1,414	8,367
CANADA		594	530	2,784	3,833	4,495	1,089	990	4,878	6,919	7,926
OTHER		1,354	1,754	12,393	15,209	16,607	1,029	2,308	19,438	19,863	26,086
Subtotal:—		5,518	9,510	51,293	69,076	71,079	11,737	11,840	82,246	89,688	114,199
FRUIT JUICES (SSE)											
ORANGE JU CNC (DEC)	KL										
CANADA		7,363	10,072	42,808	52,323	168,461	3,129	4,433	19,632	23,007	73,511
EC-12		3,588	3,452	14,218	14,398	45,720	1,923	1,228	8,756	5,313	23,066
KOREA, REPUBLIC		1,003	990	9,810	8,296	20,591	401	477	4,346	4,095	9,485
FRANCE		1,620	1,474	8,306	3,970	20,135	1,028	431	6,044	1,309	11,541
OTHER		4,471	5,538	20,362	24,598	70,005	2,049	2,259	9,283	10,675	31,910
Subtotal:—		16,425	20,052	87,197	99,615	304,776	7,503	8,397	42,016	43,091	137,571
ORANGE JU NTCNC (DEC)	KL										
JAPAN		716	963	2,600	2,652	11,401	517	976	1,999	2,655	10,090
EC-12		157	689	2,282	4,539	9,462	159	462	1,529	4,290	11,499
FRANCE		8	283	2,123	3,832	9,127	15	226	1,375	3,859	2,215
CANADA		246	251	945	1,582	4,096	398	354	1,383	1,911	6,855
OTHER		1,238	1,177	3,656	4,074	10,898	939	914	2,740	2,991	11,824
Subtotal:—		2,357	3,080	9,883	12,847	35,851	2,012	2,708	7,851	11,847	33,091
GRPFRT JU CNC (DEC)	KL										
JAPAN		1,857	1,186	5,456	2,865	19,641	1,337	850	3,927	2,027	13,986
CANADA		749	710	3,113	2,980	8,094	539	526	2,167	2,146	5,754
EC-12		299	359	1,253	2,846	4,513	215	213	779	1,404	2,723
FINLAND		0	0	404	345	2,097	0	0	198	126	983
OTHER		185	355	796	611	1,971	123	140	464	278	1,104
Subtotal:—		3,101	2,661	11,022	9,647	36,316	2,214	1,728	7,534	5,980	24,549
FRESH VEGETABLES											
FR ASPARAGUS (OCT)	MT										
CANADA		1,116	1,184	2,192	2,447	8,873	2,045	2,351	4,183	5,507	15,001
JAPAN		1,769	1,307	2,963	2,478	5,355	6,699	5,107	12,823	10,620	21,271
SWITZERLAND		787	685	870	822	1,621	2,291	2,202	2,632	2,736	4,524
EC-12		277	650	533	971	1,474	852	1,769	1,703	2,897	4,075
OTHER		12	49	36	80	178	44	138	135	235	597
Subtotal:—		3,961	3,875	6,594	6,798	17,501	11,931	11,569	21,477	21,995	45,468

**U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED
MAR 91**

COMMODITY AND COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
PII ONIONS (OCT)	MT										
CANADA		5,477	7,736	24,300	41,062	65,185	2,672	2,912	9,722	16,192	23,737
JAPAN		108	60	28,760	23,139	31,433	34	12	6,620	4,719	7,170
TAIWAN		0	0	3,195	2,781	8,276	0	0	815	694	2,149
OTHER		159	855	10,222	29,835	14,711	77	503	2,688	9,135	4,208
Subtotal:—		5,744	8,651	66,477	96,818	119,605	2,784	3,426	19,845	30,740	37,264
CANNED VEGETABLES											
CND SWT CORN (AUG)	MT										
JAPAN		1,815	3,365	25,993	20,256	44,278	2,888	2,891	22,825	17,484	36,675
EC-12		1,245	4,048	29,135	32,594	42,328	1,641	3,047	22,495	25,053	32,642
GERMANY		711	1,711	12,440	12,553	16,057	509	1,259	10,018	9,810	12,921
TAIWAN		694	294	8,941	9,779	13,508	517	288	7,022	9,473	10,064
UNITED KINGDOM		618	1,369	7,636	8,505	13,103	435	1,022	5,322	6,146	9,377
HONG KONG		558	665	4,101	4,805	8,103	302	352	2,511	2,166	4,036
OTHER		1,729	2,601	15,102	13,835	23,274	1,214	1,908	11,121	11,218	17,684
Subtotal:—		9,042	10,972	83,271	81,269	131,490	6,562	8,486	65,974	65,394	101,101
CND TOM PAS (JUL)	MT										
CANADA		1,670	2,143	10,141	20,074	13,474	1,888	2,354	10,230	21,432	13,398
JAPAN		4	1,290	2,714	9,015	2,745	5	1,295	3,243	8,964	3,272
PHILIPPINES		143	2	1,412	2,232	1,712	123	5	1,221	212	1,483
KOREA, REPUBLIC		52	237	1,016	3,873	1,323	78	224	1,348	3,816	1,755
OTHER		298	963	1,971	4,489	2,359	325	923	2,071	4,382	2,520
Subtotal:—		2,167	4,636	17,254	37,683	21,614	2,419	4,801	18,114	38,805	22,428
CND TOM SAUCE (JUL)	MT										
EC-12		706	282	9,317	4,189	12,861	762	247	7,237	3,820	10,485
CANADA		433	1,409	4,777	7,895	6,271	374	1,297	3,134	6,950	4,381
UNITED KINGDOM		673	5	2,399	2,915	5,379	722	8	2,379	2,381	5,071
BELGIUM-LUXEMBOU		17	0	5,017	0	5,033	15	0	3,068	0	3,083
JAPAN		298	196	2,570	2,536	3,389	319	198	2,271	2,986	2,960
MEXICO		119	105	2,551	1,463	2,872	103	61	1,747	938	1,962
OTHER		406	357	3,561	4,361	4,613	407	398	3,694	4,426	4,772
Subtotal:—		1,863	2,349	22,775	20,444	30,006	1,965	2,202	18,083	19,120	24,560
F2N VEGETABLES											
F2N SWT CORN (JUL)	MT										
JAPAN		2,903	3,030	24,957	25,282	34,373	2,245	2,674	21,146	22,350	28,722
EC-12		713	329	5,059	4,701	8,181	505	275	3,408	3,007	5,717
AUSTRALIA		409	209	4,357	2,945	5,215	280	220	2,980	2,423	3,598
UNITED KINGDOM		410	167	2,514	2,828	4,346	335	177	1,889	1,903	3,456
GERMANY		281	47	1,905	1,291	3,067	155	25	1,025	699	1,640
OTHER		874	1,092	7,179	9,030	10,170	816	867	5,404	7,309	8,827
Subtotal:—		4,899	4,659	41,552	41,959	57,939	3,846	4,035	32,938	35,089	45,864
F2N F FRY (JUL)	MT										
JAPAN		9,021	11,481	75,302	79,647	101,396	6,255	8,119	53,396	56,769	71,942
CANADA		3,972	503	7,702	10,631	22,701	2,850	461	5,495	7,952	15,715
HONG KONG		692	744	8,628	6,422	10,781	461	517	3,841	4,390	5,226
OTHER		2,782	2,790	23,293	24,617	30,358	1,977	2,517	14,884	18,871	19,973
Subtotal:—		16,467	15,518	114,925	121,317	165,237	11,542	11,614	77,615	87,982	112,905
TREE NUTS											
ALMONDS UNSH (JUL)	MT										
JAPAN		53	321	2,164	1,607	2,180	174	1,063	6,527	5,230	6,585
INDIA		46	167	1,914	4,705	1,960	85	187	4,704	6,837	4,804
CANADA		44	44	710	1,317	859	130	140	1,748	2,932	2,113
EC-12		0	102	569	1,500	678	0	190	895	2,244	1,074
MEXICO		20	0	592	90	648	16	0	1,347	192	1,456
OTHER		232	94	1,281	888	1,614	617	227	3,856	1,950	4,869
Subtotal:—		395	729	7,230	10,107	7,938	1,023	1,808	19,078	19,386	20,902
ALMND SH/PREP (JUL)	MT										
EC-12		6,215	11,556	58,133	88,718	89,186	19,667	33,312	188,670	247,880	282,411
GERMANY		3,211	6,768	28,971	43,108	45,630	9,778	19,031	93,346	118,415	143,239
JAPAN		2,036	1,301	19,525	14,323	24,774	7,491	3,745	65,261	45,992	84,712
FRANCE		888	1,103	8,277	11,148	11,796	2,771	3,171	25,422	30,580	36,031
UNITED KINGDOM		635	1,010	8,157	10,408	11,686	2,197	3,110	28,071	31,069	39,702
NETHERLANDS		634	1,219	6,694	8,100	10,118	2,149	3,755	22,138	23,617	33,554
OTHER		6,115	3,283	42,779	39,120	51,031	20,035	9,617	134,963	110,865	162,310
Subtotal:—		14,366	16,138	110,436	142,161	164,990	47,193	46,674	388,894	404,737	529,433
WALNUTS SH (AUG)	MT										
EC-12		90	190	3,434	3,428	4,146	256	668	8,837	10,875	11,023
JAPAN		128	141	2,311	1,515	2,846	399	562	4,582	5,951	6,438
SPAIN		33	51	1,443	748	1,721	107	217	3,792	2,755	4,919
CANADA		144	120	1,127	1,168	1,525	472	445	2,073	3,880	3,387
GERMANY		18	40	885	998	1,242	22	119	2,047	2,780	2,771
ISRAEL		49	90	958	895	1,168	182	403	2,978	3,378	3,785
OTHER		123	201	2,583	2,435	3,245	339	521	7,049	7,643	9,233
Subtotal:—		533	751	10,415	9,441	12,931	1,649	2,600	25,518	31,727	33,863
WALNUTS UNSH (AUG)	MT										
EC-12		134	82	46,174	43,895	46,483	301	242	75,897	77,497	76,441
GERMANY		41	32	16,389	13,560	16,453	155	131	26,636	22,859	26,785
SPAIN		0	40	14,607	13,860	14,607	0	92	24,538	25,045	24,538
ITALY		93	0	7,112	8,559	7,199	146	0	12,041	15,171	12,185
NETHERLANDS		0	0	2,762	3,664	2,806	0	0	4,437	6,762	4,507
OTHER		132	77	5,047	5,590	5,721	382	129	9,612	11,188	11,153
Subtotal:—		266	159	51,222	49,485	52,204	683	371	85,509	88,685	87,593
HOPS&PRODUCTS											
HOP PELTS (SEP)	MT										
BRAZIL		51	30	1,751	216	3,734	202	109	4,920	787	11,306
COLOMBIA		0	0	1,967	69	2,127	0	0	10,669	344	11,468
CANADA		342	186	1,133	561	1,232	1,821	1,399	6,836	3,676	4,406
EC-12		171	0	536	1,173	1,041	569	3	1,802	6,034	3,676
GERMANY		167	0	470	846	964	555	3	1,578	4,051	3,392
OTHER		95	74	338	506	1,015	408	679	1,588	3,862	5,574
Subtotal:—		659	290	5,726	2,524	9,149	2,999	2,190	25,815	14,704	39,430

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED
MAR 91

COMMODITY AND COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
HOP EXTRACT(SEP)	MT										
MEXICO		10	0	494	303	919	312	0	5,885	6,691	10,467
EC-12		46	136	399	601	690	523	1,517	3,993	7,175	7,429
COLOMBIA		0	0	251	58	416	0	0	2,819	945	6,388
PHILIPPINES		14	12	173	49	313	228	197	2,248	1,374	4,110
NETHERLANDS		9	39	93	106	192	91	530	2,707	1,210	1,832
IRELAND		0	0	149	55	170	0	0	1,475	613	1,718
OTHER		48	107	414	496	798	753	1,380	3,952	5,576	8,608
Subtotal:-----		116	254	1,730	1,508	3,136	1,817	3,094	18,817	21,760	37,002
HOPS, NSPF (SEP)	MT										
EC-12		157	18	516	301	1,093	704	163	2,487	1,916	4,806
GERMANY		135	0	272	218	834	492	0	921	1,118	3,161
UNION OF SOVIET		275	0	275	0	323	1,010	0	1,010	0	1,356
CANADA		28	1	309	39	319	130	12	1,827	242	1,887
BRAZIL		10	0	99	40	250	28	0	379	131	849
BELGIUM-LUXEMBOU		59	17	132	23	146	0	0	947	250	1,023
OTHER		59	17	111	126	239	145	368	602	1,199	2,085
Subtotal:-----		530	36	1,310	505	2,223	2,018	543	6,305	3,518	10,983
WINE											
GRAPE WINE (JAN)	KL										
EC-12		1,778	2,811	4,024	6,352	26,140	2,575	4,215	5,809	9,141	38,362
CANADA		2,229	1,827	5,833	4,693	23,852	2,116	1,882	5,283	5,056	26,038
JAPAN		1,538	1,252	3,184	3,921	16,961	2,543	1,470	5,240	5,545	25,518
UNITED KINGDOM		900	1,385	2,281	2,818	14,233	1,287	2,062	3,239	3,980	21,475
SWEDEN		370	486	481	837	4,767	427	259	619	506	5,117
OTHER		1,634	1,572	3,890	4,151	17,749	2,395	2,325	5,810	6,016	24,502
Subtotal:-----		7,550	7,948	17,412	19,956	99,469	10,056	10,150	22,760	26,214	119,517

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN
MARKETING YEAR BEGINNING AS INDICATED
MAR 91

COMMODITY AND COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FR FRT & MLNS											
FR APPLES (JUL)	MT										
NEW ZEALAND		2,022	2,133	7,298	7,920	26,917	1,809	1,990	3,796	4,265	14,904
CANADA		3,862	8,147	35,754	51,158	46,355	1,447	2,375	10,831	15,681	13,502
CHILE		9,449	1,886	9,877	1,991	22,427	3,010	701	3,159	737	7,250
OTHER		0	18	7,155	2,098	10,777	0	8	3,255	891	4,674
Subtotal:-----		15,333	13,184	60,084	63,167	106,476	6,267	5,074	21,041	21,573	40,330
FR PEARS (JUL)	MT										
CHILE		12,024	8,698	21,212	16,486	23,226	4,518	2,871	7,720	5,749	8,428
JAPAN		0	0	2,460	1,270	2,460	0	0	5,819	3,153	5,819
ARGENTINA		1,543	3,961	6,358	4,798	11,659	699	2,255	2,864	2,724	4,894
OTHER		253	338	1,677	1,838	4,890	433	450	2,446	2,534	5,877
Subtotal:-----		13,820	12,996	31,706	24,392	42,235	5,670	5,576	18,850	14,160	25,018
APRICOT (MAY)	MT										
CHILE		0	0	641	822	641	0	0	476	111	476
TURKEY		18	0	183	0	183	34	0	350	0	350
NEW ZEALAND		0	2	71	106	183	0	3	216	173	216
OTHER		0	0	13	40	13	0	0	15	39	15
Subtotal:-----		18	2	907	968	907	34	3	1,057	803	1,057
PEACH-NEC (MAY)	MT										
CHILE		0,362	9,346	47,794	49,016	47,938	5,333	5,785	30,924	32,250	31,018
OTHER		42	35	688	3,200	711	82	72	678	2,315	716
Subtotal:-----		8,404	9,381	48,482	52,217	48,648	5,415	5,857	31,602	34,566	31,734
PLUM-PRUNE (MAY)	MT										
CHILE		3,418	3,417	20,630	21,477	22,685	2,197	2,223	12,918	13,635	14,093
OTHER		0	3	268	29	2,688	2	5	179	42	179
Subtotal:-----		3,418	3,420	20,899	21,506	22,953	2,199	2,228	13,098	13,677	14,272
FRESH GRAPES (MAY)	MT										
CHILE		111,264	86,855	173,301	226,805	333,980	81,161	57,806	209,313	161,044	253,319
OTHER		2	0	29,981	29,101	29,981	3	0	32,975	20,071	32,975
Subtotal:-----		111,266	86,855	303,282	255,906	363,961	80,164	57,806	242,288	181,115	286,294
FR RASPBRY (JAN)	MT										
CANADA		0	18	0	18	5,070	0	11	0	11	5,169
CHILE		379	221	894	516	1,348	816	444	2,194	1,001	3,262
OTHER		1	17	1	25	1	2	39	7	59	11
Subtotal:-----		380	256	895	560	6,419	817	493	2,201	1,071	8,442
FR STRAWBRIS (JAN)	MT										
MEXICO		2,633	2,043	5,441	5,624	12,601	3,685	4,212	7,382	8,924	13,074
OTHER		31	45	572	692	1,997	21	110	727	1,321	3,777
Subtotal:-----		2,665	2,087	6,013	6,315	14,598	3,707	4,322	8,109	10,245	16,850
FR BANANA (JAN)	MT										
ECUADOR		106,288	92,896	299,308	283,698	1,142,155	27,614	24,023	79,105	72,266	297,828
COSTA RICA		40,572	61,382	115,561	165,931	571,550	11,904	19,813	35,508	54,277	177,403
HONDURAS		51,291	39,848	143,516	109,022	485,596	15,908	11,050	44,529	30,035	141,498
OTHER		70,436	73,538	182,982	213,335	894,855	20,011	22,313	53,081	62,933	258,703
Subtotal:-----		268,588	267,663	741,366	771,986	3,094,157	75,437	77,199	212,222	119,510	875,432
FR MANGO (JAN)	MT										
MEXICO		1,288	4,342	1,912	4,793	50,922	1,072	4,787	1,944	5,245	52,354
OTHER		1,005	1,261	1,759	1,706	8,085	737	819	1,209	1,512	5,803
Subtotal:-----		2,292	5,603	3,670	6,499	59,007	1,810	5,605	3,153	6,756	58,157

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COMMODITY AND COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FR PINAPLE(JAN)	MT										
COSTA RICA		3,186	3,811	10,239	11,283	54,331	1,752	1,806	5,885	5,407	29,265
DOMINICAN REPUBL		3,723	4,132	8,609	8,857	38,580	1,616	960	1,445	2,065	7,821
OTHER		1,924	3,384	4,665	6,810	19,672	1,033	752	1,936	1,595	6,461
Subtotal:—		8,833	11,327	23,514	26,951	112,584	3,402	3,519	9,266	9,067	43,547
FR CANTLPE(MAY)	MT										
MEXICO		22,660	21,193	91,042	107,543	132,236	8,428	6,615	32,851	37,233	48,040
OTHER		11,598	24,871	76,668	77,750	95,283	3,756	7,165	19,166	21,232	24,173
Subtotal:—		34,258	46,064	167,711	185,293	227,518	12,184	13,780	52,017	58,465	72,213
FR MELON,OT(MAY)	MT										
MEXICO		8,424	6,853	46,627	42,677	56,978	2,354	1,839	14,479	13,754	17,596
OTHER		7,805	13,424	29,580	38,247	40,167	2,499	5,998	8,475	15,180	12,201
Subtotal:—		16,229	20,277	76,207	80,924	97,146	4,852	7,836	22,953	28,934	29,797
FR ORANGES(NOV)	MT										
ISRAEL		1,715	16	1,755	36	2,713	1,048	11	1,058	20	2,195
DOMINICAN REPUBL		281	224	783	458	3,893	94	59	246	121	1,092
MEXICO		509	4,958	3,488	9,348	3,488	163	3,062	937	4,736	937
OTHER		594	5,220	846	9,395	1,851	157	2,999	296	6,881	559
Subtotal:—		3,099	10,418	6,873	19,237	11,946	1,462	6,131	2,537	11,759	4,782
CANNED FRUIT											
CND MANDRN(JAN)	MT										
EC-12		3,245	4,842	9,322	12,733	29,038	2,812	5,795	8,411	15,153	26,503
SPAIN		3,245	4,841	9,306	12,703	28,984	2,812	5,787	8,398	15,105	26,465
KOREA, REPUBLIC		1,414	43	3,456	115	6,516	1,887	70	4,620	172	8,719
OTHER		332	1,096	1,573	2,235	6,950	356	1,061	1,656	2,114	6,904
Subtotal:—		4,992	5,980	14,352	15,083	42,503	5,056	6,926	14,687	17,439	42,126
CND BLW OLV(NOV)	MT										
EC-12		1,220	888	5,776	5,119	13,619	2,007	1,694	9,575	9,271	22,501
SPAIN		1,081	797	5,306	4,764	12,657	1,749	1,491	8,784	8,509	20,783
OTHER		104	112	639	565	1,621	182	192	1,091	955	2,704
Subtotal:—		1,324	1,000	6,415	5,684	15,241	2,190	1,885	10,667	10,226	25,205
CND GRN OLV(NOV)	MT										
EC-12		3,384	2,283	19,832	16,920	45,137	7,969	5,534	45,858	38,836	104,797
SPAIN		3,273	2,201	19,208	16,485	44,150	7,807	5,344	44,490	38,065	102,779
OTHER		88	53	442	311	866	157	98	766	523	1,477
Subtotal:—		3,471	2,337	20,274	17,231	46,002	8,126	5,632	46,625	39,359	106,273
CND PEACH(JUN)	MT										
EC-12		1,511	432	22,998	7,741	25,565	917	242	14,684	4,515	16,262
GREECE		1,432	432	18,736	7,573	21,208	851	240	11,531	4,338	13,025
CHILE		563	94	7,998	3,602	9,750	387	65	5,621	2,386	6,808
OTHER		453	19	3,435	1,193	5,868	315	10	1,923	343	3,429
Subtotal:—		2,526	545	34,431	12,536	41,182	1,619	317	22,229	7,243	26,499
CND PINAPLE(JAN)	MT										
THAILAND		11,064	11,294	30,573	33,058	128,019	6,036	7,162	16,111	20,630	70,374
PHILIPPINES		7,234	6,239	22,189	21,532	92,290	4,419	3,979	13,785	13,881	58,439
OTHER		3,454	2,672	8,025	14,035	53,672	2,283	1,731	4,790	9,657	37,948
Subtotal:—		21,752	20,205	60,787	68,625	273,981	12,737	12,872	34,686	44,168	166,761
DRIED FRUIT											
DRD APRCT(JUL)	MT										
TURKEY		824	406	5,600	4,873	7,334	1,339	1,054	10,042	11,799	12,929
OTHER		58	1	876	257	991	182	2	2,545	887	2,965
Subtotal:—		882	407	6,475	5,129	8,324	1,521	1,057	12,587	12,686	15,894
DATES(SEP)	MT										
PAKISTAN		893	224	4,132	2,128	5,890	723	227	3,593	2,124	4,741
IRAQ		150	0	1,677	15	1,791	113	0	1,907	22	2,063
OTHER		297	456	1,534	1,302	1,900	391	512	1,636	1,516	2,217
Subtotal:—		1,340	680	7,342	3,444	9,582	1,227	739	7,136	3,663	9,021
DRD FIG(SEP)	MT										
EC-12		0	14	2,300	810	2,300	0	9	3,882	2,263	3,882
GREECE		0	14	2,217	758	2,217	0	9	3,696	2,087	3,696
OTHER		1	0	457	217	463	2	0	720	468	734
Subtotal:—		1	14	2,758	1,028	2,763	2	9	4,602	2,732	4,616
DRD RAISIN(AUG)	MT										
MEXICO		124	208	4,385	3,607	4,547	146	243	4,055	2,549	4,233
CHILE		77	451	2,166	3,590	3,931	74	340	1,863	3,392	3,662
TURKEY		76	0	1,253	21	1,474	73	0	1,430	25	1,655
OTHER		18	0	747	162	813	12	0	761	142	808
Subtotal:—		295	659	8,552	7,381	10,764	305	583	8,110	6,109	10,357
FRUIT JUICE(SSE)											
APPLE JUIC(JUL)	KL										
EC-12		27,438	26,840	152,396	157,985	215,273	5,630	7,405	32,663	38,528	45,506
ARGENTINA		3,884	3,913	154,933	215,925	246,898	757	960	27,830	36,088	42,788
GERMANY		20,388	21,944	107,098	123,632	158,806	4,352	6,089	22,855	28,538	33,559
OTHER		25,613	34,504	197,502	360,924	267,401	5,722	8,563	43,996	75,884	57,166
Subtotal:—		56,935	65,258	504,831	734,835	729,572	12,110	16,929	104,489	150,500	145,460
FCOJ(DEC)	KL										
BRAZIL		96,027	85,991	644,839	345,423	1,509,047	38,126	16,964	201,391	74,844	531,803
OTHER		35,735	17,927	95,708	43,750	236,420	14,769	4,400	36,048	11,922	90,604
Subtotal:—		131,762	103,919	740,097	389,174	1,745,467	52,895	21,364	237,439	86,766	622,408

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COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
GRAPE JU(JAN)	KL										
ARGENTINA		3,762	4,700	14,014	17,750	85,063	718	1,034	2,684	3,479	16,243
BRAZIL		1,448	192	2,593	1,015	15,000	445	87	829	451	5,643
OTHER		891	701	2,272	2,310	12,472	207	134	772	847	4,170
Subtotal:—		6,100	5,594	18,879	21,075	112,535	1,370	1,255	4,285	4,778	26,056
PNEAPL JUCN(JAN)	KL										
THAILAND		11,963	9,712	44,030	42,695	134,791	1,933	2,762	7,582	10,509	25,723
PHILIPPINES		5,073	7,189	18,342	29,372	90,632	764	1,491	3,151	5,944	17,525
OTHER		3,622	4,283	7,342	16,679	56,335	612	1,570	1,347	4,534	12,413
Subtotal:—		20,658	21,183	69,713	88,746	281,758	3,309	5,824	12,080	20,987	55,660
PNEAPL JUNC(JAN)	KL										
JAPAN		161	471	820	5,211	25,895	88	203	397	2,413	10,048
PHILIPPINES		1,221	1,539	5,056	6,595	28,573	359	447	1,487	1,833	8,362
OTHER		131	94	735	2,482	12,093	42	70	272	338	954
Subtotal:—		1,513	2,104	6,612	12,288	56,561	489	720	2,157	4,584	19,364
FROZEN FRUIT											
FZN STRBRY(DEC)	MT										
MEXICO		5,286	4,856	8,959	8,807	18,446	6,547	4,944	11,622	9,517	23,776
OTHER		533	38	1,606	504	3,362	607	459	1,746	2,260	4,134
Subtotal:—		5,819	4,894	10,566	9,311	21,808	7,154	5,402	13,368	11,777	27,910
FRESH VEGETABLES											
FR BEANS(OCT)	MT										
MEXICO		2,454	1,154	11,017	9,473	11,941	2,025	1,543	15,107	8,480	15,807
OTHER		51	21	177	96	584	59	11	218	94	483
Subtotal:—		2,504	1,176	11,193	9,568	12,525	2,083	1,554	15,325	8,574	16,291
FR CARROT(OCT)	MT										
CANADA		1,973	2,848	36,747	32,001	45,379	590	1,012	6,971	9,620	8,859
MEXICO		1,782	1,221	4,406	4,599	13,998	427	420	959	1,395	2,583
OTHER		40	13	350	105	429	7	3	292	51	373
Subtotal:—		3,795	4,082	41,503	36,705	59,806	1,024	1,435	8,221	11,067	11,814
FR CABBAGE(OCT)	MT										
CANADA		1,339	1,352	17,219	8,566	21,869	484	247	4,890	1,911	5,883
MEXICO		3,725	164	19,244	1,442	19,837	494	34	2,331	335	2,497
OTHER		405	0	1,719	101	1,833	76	0	363	188	455
Subtotal:—		5,468	1,516	38,183	10,109	43,540	1,055	281	7,584	2,434	8,835
FR CELERY(OCT)	MT										
MEXICO		6,506	3,515	11,473	9,080	14,387	1,322	972	2,803	2,876	3,492
CANADA		25	0	668	725	3,622	13	0	168	185	829
OTHER		110	24	576	455	894	39	4	115	78	202
Subtotal:—		6,640	3,539	12,716	10,260	18,903	1,374	976	3,086	3,140	4,522
FR CUCMBR(OCT)	MT										
MEXICO		26,149	21,537	153,322	137,071	176,832	10,043	11,256	61,825	58,869	71,005
OTHER		1,009	1,441	8,440	6,954	12,310	447	551	2,274	2,213	4,716
Subtotal:—		27,158	22,978	161,761	144,025	189,142	10,490	11,807	64,099	61,082	75,721
FR CAULFLWR(OCT)	MT										
MEXICO		1,349	855	8,185	6,699	8,827	265	180	1,948	1,475	2,058
CANADA		0	0	452	520	1,493	0	0	150	212	521
OTHER		0	0	14	31	30	0	0	12	8	25
Subtotal:—		1,349	855	8,651	7,250	10,350	265	180	2,110	1,695	2,604
FR GARLIC(OCT)	MT										
ARGENTINA		1,033	1,327	3,135	3,104	3,786	1,504	1,677	4,423	4,201	5,620
MEXICO		390	536	438	587	7,693	335	452	395	523	5,460
OTHER		281	435	4,112	2,194	8,370	500	735	4,082	2,512	8,026
Subtotal:—		1,704	2,297	7,684	5,885	19,849	2,339	2,864	8,901	7,237	19,106
FR ONION(OCT)	MT										
MEXICO		35,109	50,393	84,887	99,511	147,382	7,866	12,503	35,882	54,401	59,584
OTHER		5,467	5,254	16,912	15,170	26,786	1,843	1,289	5,547	4,624	9,601
Subtotal:—		40,577	55,647	101,799	114,681	174,168	9,710	13,791	41,429	59,025	69,185
FR PEPPERS(OCT)	MT										
MEXICO		18,647	16,966	95,324	86,280	125,793	23,545	12,653	110,341	63,164	133,993
OTHER		203	164	2,593	2,214	9,695	752	564	6,574	7,121	22,073
Subtotal:—		18,851	17,130	97,917	88,494	135,488	24,298	13,216	116,915	70,285	156,065
FR SEED POT(OCT)	MT										
CANADA		32,903	26,472	62,824	55,206	91,589	7,522	5,365	13,411	10,762	19,512
OTHER		0	0	20	0	20	0	0	23	0	23
Subtotal:—		32,903	26,472	62,844	55,206	91,609	7,522	5,365	13,434	10,762	19,535
FR TBL POT(OCT)	MT										
CANADA		19,980	35,889	131,263	150,498	213,223	6,241	5,690	30,150	24,451	50,748
OTHER		141	0	150	31	194	27	0	38	35	74
Subtotal:—		20,121	35,889	131,414	150,529	213,417	6,268	5,690	30,188	24,486	50,822
FR TOMATO(OCT)	MT										
MEXICO		74,540	67,549	291,772	223,434	378,344	97,761	55,727	347,655	133,489	384,020
OTHER		1,711	267	4,754	1,618	8,918	1,006	238	2,943	1,415	7,231
Subtotal:—		76,251	67,816	296,525	225,052	387,262	98,767	55,964	350,598	134,905	391,251
FR ASPARG(OCT)	MT										
MEXICO		5,973	6,023	11,597	15,243	14,795	8,833	8,319	18,259	22,528	21,246
OTHER		144	0	3,212	4,123	4,046	156	0	4,709	5,013	5,791
Subtotal:—		6,117	6,023	14,809	19,365	18,841	8,989	8,319	22,968	27,541	27,037
CANNED VEGETABLES											
CND TOM PST(JUL)	MT										
MEXICO		1,699	2,510	4,818	5,335	24,664	1,155	1,613	3,631	3,676	20,233
CHILE		4,277	742	5,374	3,098	18,181	4,083	578	5,008	2,518	18,002
OTHER		1,222	224	25,779	7,562	31,179	1,053	212	22,347	5,060	27,243
Subtotal:—		7,198	3,476	35,971	15,994	74,024	6,292	2,403	30,986	11,253	63,479

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COMMODITY AND COUNTRY		QUANTITY				VALUE (1,000 DOLLARS)					
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
CND TOM SAUCE(JUL)	MT										
EC-12		477	394	2,889	3,273	4,566	271	154	1,856	2,036	2,701
ITALY		477	90	2,146	2,250	3,778	268	77	1,167	1,397	1,981
DOMINICAN REPUB		151	125	1,778	1,436	2,307	103	77	1,221	940	1,583
OTHER		352	89	3,335	6,295	5,501	175	50	1,917	3,843	2,984
Subtotal:—		980	608	8,002	11,004	12,373	549	281	4,993	6,819	7,268
CND TOMATO(JUL)	MT										
EC-12		1,386	1,742	14,651	16,280	18,568	761	592	6,918	5,734	8,878
CHILE		2,149	194	3,042	2,773	10,491	1,379	88	1,942	1,670	6,357
ITALY		795	1,500	10,277	13,875	13,112	427	517	4,708	4,869	6,018
ISRAEL		231	274	9,409	14,977	9,611	120	142	5,607	6,648	5,705
OTHER		1,698	848	7,784	7,629	15,348	1,040	434	4,189	3,667	8,561
Subtotal:—		5,464	3,057	34,887	41,658	54,019	3,300	1,256	18,656	17,720	29,501
CND MSHROOM(JUL)	MT										
TAIWAN		1,449	799	6,206	6,276	9,807	5,187	2,337	18,665	17,006	30,163
HONG KONG		1,179	722	7,952	7,685	9,765	2,533	1,505	17,097	16,357	21,009
INDONESIA		1,083	768	4,489	7,037	6,792	3,275	2,430	12,681	21,596	19,463
OTHER		1,478	2,011	15,433	13,246	20,809	3,635	3,688	36,851	28,897	48,339
Subtotal:—		5,189	4,301	34,080	34,244	47,172	14,631	9,961	85,294	83,856	119,574
FROZEN VEGETABLES											
FZN BROCLI(SEP)	MT										
MEXICO		11,221	14,956	58,791	57,883	106,319	7,914	9,646	39,151	39,037	70,113
OTHER		274	205	6,124	5,780	8,295	160	137	4,055	3,555	5,377
Subtotal:—		11,495	15,161	64,916	63,663	114,615	8,074	9,783	43,205	42,592	75,490
FZN CAULFLR(SEP)	MT										
MEXICO		421	336	23,084	23,652	25,870	316	239	16,074	18,057	18,152
OTHER		49	29	870	1,128	1,696	42	19	610	731	1,143
Subtotal:—		470	364	23,954	24,780	27,565	358	257	16,684	18,789	19,295
FZN POTATO(SEP)	MT										
CANADA		4,666	5,107	27,880	41,815	52,897	2,695	2,755	15,234	22,911	29,611
OTHER		166	31	814	306	1,156	94	19	465	174	654
Subtotal:—		4,832	5,138	28,694	42,121	54,053	2,788	2,774	15,699	23,085	30,266
TREE NUTS											
PISTACHIO NSH(SEP)	MT										
TURKEY		42	3	573	3	575	163	11	2,388	11	2,400
HONG KONG		26	57	232	211	408	52	123	444	396	853
OTHER		6	0	56	54	109	28	0	236	131	326
Subtotal:—		73	60	861	267	1,093	243	134	3,068	537	3,579
CASHEW NUT(AUG)	MT										
INDIA		1,221	1,178	14,760	18,390	20,781	5,346	5,473	69,986	86,342	95,002
BRAZIL		1,863	1,317	14,817	13,836	22,629	6,964	5,791	56,670	60,235	84,878
OTHER		701	422	5,925	7,413	8,643	2,484	1,930	21,484	31,762	30,703
Subtotal:—		3,785	2,916	35,502	39,638	52,053	14,794	13,193	148,140	178,338	210,583
FILBERTS(AUG)	MT										
TURKEY		219	585	1,671	3,557	2,520	586	1,393	4,363	10,427	6,682
EC-12		26	41	793	174	977	86	112	1,518	527	1,917
OTHER		21	0	75	13	75	57	2	211	130	217
Subtotal:—		266	626	2,540	3,743	3,573	729	1,507	6,093	11,084	8,816
PECANS NSH(SEP)	MT										
MEXICO		0	9	4,871	10,950	6,616	0	26	7,740	23,916	11,328
OTHER		0	0	0	231	535	0	0	0	597	1,376
Subtotal:—		0	9	4,871	11,181	7,151	0	26	7,740	24,513	12,704
WINES											
CHMP&SPRK WN(JAN)	KL										
EC-12		1,904	1,558	6,224	5,197	38,597	14,575	12,806	41,357	40,399	271,196
FRANCE		762	550	1,836	1,545	12,104	10,891	9,010	25,134	25,119	171,224
ITALY		668	445	2,350	1,655	14,317	2,170	1,865	9,497	7,683	60,349
OTHER		15	7	47	33	223	39	21	136	117	774
Subtotal:—		1,919	1,565	6,271	5,229	38,819	14,614	12,827	41,494	40,515	271,970
FT&VERM WN(JAN)	KL										
EC-12		1,192	934	3,939	3,182	17,259	4,350	3,574	12,806	10,707	58,368
SPAIN		510	388	1,349	1,012	5,767	2,114	2,023	5,091	4,598	23,040
ITALY		434	447	2,020	1,796	8,942	888	997	4,258	4,033	19,934
PORTUGAL		108	37	273	161	1,288	931	319	2,598	1,375	11,202
OTHER		42	6	84	17	244	84	22	182	60	675
Subtotal:—		1,233	940	4,023	3,199	17,502	4,434	3,597	12,988	10,767	59,043
OTH GP WINE(JAN)	KL										
EC-12		13,628	11,849	35,762	31,605	165,679	39,635	44,340	100,760	111,284	527,768
FRANCE		4,991	4,877	12,787	11,131	55,076	21,597	25,727	52,971	58,381	257,410
ITALY		6,298	5,199	17,113	15,856	83,274	12,574	13,549	33,740	40,401	197,897
OTHER		2,098	2,203	5,421	6,107	24,903	4,487	4,491	10,099	11,483	49,305
Subtotal:—		15,727	14,052	41,183	37,712	190,583	44,123	48,831	110,859	122,767	577,073
OTH WN PROD(JAN)	KL										
JAPAN		407	327	982	803	3,618	959	875	2,408	2,094	8,878
EC-12		214	246	620	601	3,631	335	333	883	831	5,149
ITALY		96	112	294	250	1,785	119	152	377	377	2,429
OTHER		134	22	262	127	971	261	49	533	266	1,803
Subtotal:—		754	596	1,864	1,531	8,220	1,556	1,258	3,824	3,191	15,829
CUT FLOWERS											
ROSES(JAN)	NONE										
COLOMBIA							4,341	3,783	18,861	22,795	62,960
OTHER							1,255	1,144	7,424	9,793	23,078
Subtotal:—							5,596	4,927	26,285	32,588	86,038
CARNATIONS(JAN)	NONE										
COLOMBIA							5,968	6,333	18,399	19,929	63,630
OTHER							273	503	1,017	1,254	3,301
Subtotal:—							6,241	6,837	19,417	21,183	66,931

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